Transaction Coordinator's Guide

v14.0

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

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Overview

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

Who is a Transaction Coordinator?

Within TransactionPoint, the transaction coordinator can:

- Create new transactions for properties
- Update transactions
- Place and review orders for transactions
- Upload and manage documents for a property

System Requirements

Microsoft Windows 2000 or higher or Vista Operating System
Microsoft Internet Explorer 6.0 or higher
Optional Browser compatibility: Firefox, Google Chrome and Safari

Role Descriptions

1. **Site Admin (SA)**
   - Maintain site look and feel
   - Manages entire site Realty Roster
   - Manages entire site Service Provider Roster
   - Adds MLS Boards to site (authentication requires agreement)
   - Customizes Key Dates
   - Establishes Activity Categories
   - Manages Master Activity Template
     - Establishes business rules and settings
   - Manages sub Master Activity Templates
     - Establishes business rules and settings
   - Manages transaction contacts
     - Merge accounts (example, duplicates were added)
     - Reset, change password
     - Inactivate
     - Remove
     - Update profile information
   - Run Reports
     - Order Placement
     - Personnel
     - Branch, Agent and Activity
     - Document Received Report
   - Control Utilities
     - Manage unprocessed documents
     - Control Site notifications and archive access
     - Access System Log (records site changes)
     - Mange site profile and password
   - TC level access to files (transaction number required) OPTIONAL

2. **Super User (SU)**
   - Access Archive Center for entire site
   - View access to transaction files by branch, agent and status
   - View transaction contacts, activities, documents and communication log
   - Approve or Resubmit (flag) documents
   - Approve or Resubmit (flag) activities
   - Access Letter Writer
   - Print Due/Past Due activities for files
   - Export files to DPN
   - Run Reports
     - Order Placement
     - Personnel
     - Branch, Agent and Activity
   - Mange Super User profile and password

3. **Tech User (TU)**
   - Access Archive Center for entire site
   - This is sometimes used by the network or IT department so they can download the TP needed programs (TP Printer or DML and Archive Utility)
   - Manage Tech User profile and password

4. **Company Admin / Company Manager (CA, CM)**
   - Add Branches to the company
     - Manage Branch Service Area
     - Manage Branch Preferred Providers
     - Manage Branch address and phone information
   - Add Branch Staff
     - Branch Manager
     - Branch Admin
     - Branch Executive
     - Branch Transaction Coordinator
     - View Only Agent
     - Full Access Agent
   - Manage Branch Staff
     - Access Level for Agent
     - Profile Information
       - Photo
       - Service Area
       - Preferred Providers
       - Packet Services
       - General Contact Information
     - Moving Agents to a new TC, Branch
     - Removing or Inactivating a Branch User
     - Allow a TC to have access to another branch
   - Run Reports
     - Order Placement
     - Personnel
   - Manage Company Admin User profile and password

5. **Company Auditor (CA)**

- View access to transaction files by branch, agent and status
- View transaction contacts, activities and documents
- Print Due/Past Due activities for files
- Export files to DPN
- Run Reports
    - Order Placement
    - Personnel
    - Branch, Agent and Activity
- Mange Company Auditor User profile and password

6. Branch Admin / Manager (BA, BM)

- Add Branch Staff
    - Branch Manager
    - Branch Admin
    - Branch Executive
    - Branch Transaction Coordinator
    - View Only Agent
    - Full Access Agent
- Manage Branch Staff
    - Access Level for Agent
    - Profile Information
        - Photo
        - Service Area
        - Preferred Providers
        - Packet Services
        - General Contact Information
    - Moving Agents to a new TC
    - Removing or Inactivating a Branch User
- Branch Set Up
    - Manage site banner and color scheme for branch only
    - Manage branch level activity templates
- Run Reports
    - Order Placement
    - Personnel
    - Branch, Agent and Activity Report
- Manage Branch Admin User profile and password

7. Branch Executive (BX, BE)

- View access to transaction files by branch, agent and status (limited to respective branch)
- View transaction contacts, activities, documents, communication log and orders
- Approve or Resubmit (flag) documents
- Approve or Resubmit (flag) activities
- Access Letter Writer
- Print Due/Past Due activities for files
- Export files to DPN
- Run Reports (limited to respective branch)
    - Order Placement
    - Personnel
    - Branch, Agent and Activity
- Mange Branch Executive User profile and password

8. Transaction Coordinator (TC)

- Create transactions for agents
  - Transaction Summary
    - Property details (address, etc.)
    - Send file to DPN
    - Update / Maintain Facing Sheet
    - Create transactions from AgentOffice import
    - Pull transactions from ZipForm for agents
  - Transaction Contacts
    - Manage / Add Contacts (buyer, seller, etc.)
    - Add Providers
    - Write Letters
    - Create Packet Services
    - Send contact vCard to outlook
    - Pull in contact from Top Producer
  - Activities / Orders / Documents
    - Add, remove complete activities
    - Upload, fax email documents
    - Review Document log
    - Manage Communication log
    - Manage Activity log
    - Update key date default dates
    - Place orders to service providers
    - Post activities to Top Producer / Outlook
    - Review / Add to Communication Log
- Manage Documents
  - Chop, rotate, split documents
  - Remove documents
  - Print to TP versus Printer
- Manage Orders
  - Place, cancel and reschedule orders
- Archive Transactions
- Packet Services
  - Bundle service providers by agent or tc
- Assist a TC
- Transfer files to another TC
- Calendar
  - View, export and search for activities
  - Display activities by day, week or month
- Run Reports
  - Branch, Agent and Activity Report
  - Document Received Report
- Manage Transaction Coordinator User profile and password

9. Full Access Agent (this access is the default if the FAA creates the file. If TC creates file, this access is optional and determined by the TC, otherwise the FAA has View Only access to the file. Reference View Only Agent.)

- Create transactions for themselves
  - Transaction Summary
    - Property details (address, etc.)

        - Send file to DPN
        - Update / Maintain Facing Sheet
        - Create transactions from AgentOffice import
        - Pull transactions from ZipForm
    - Transaction Contacts
        - Manage / Add Contacts (buyer, seller, etc.)
        - Add Providers
        - Write Letters
        - Create Packet Services
        - Send contact vCard to outlook
        - Pull in contact from Top Producer
    - Activities / Orders / Documents
        - Add, remove complete activities
        - Upload, fax email documents
        - Review Document log
        - Manage Communication log
        - Manage Activity log
        - Update key date default dates
        - Place orders to service providers
        - Post activities to Top Producer / Outlook
        - Review / Add to Communication Log
- Manage Documents
    - Chop, rotate, split documents
    - Remove documents
- Manage Orders
    - Place, cancel and reschedule orders
- Archive Transactions
- Packet Services
    - Bundle service providers
- Calendar
    - View, export and search for activities
    - Display activities by day, week or month
- Run Reports
    - Branch, Agent and Activity Report
- Manage Full Access Agent User profile and password
    - Establish transaction summary report delivery schedule

10. View Only Agent (TC must create file for View Only Agent)

- View transactions created by a TC
    - Transaction Summary
        - Property details (address, etc.)
        - Send file to DPN
        - View/Print Facing Sheet
        - Pull transactions from ZipForm and send to TC
    - Transaction Contacts
        - View Contacts and Providers
        - Write Letters
    - Activities / Orders / Documents
        - View activities
        - Email documents
        - Fax documents into file
        - Review / Add to Communication log

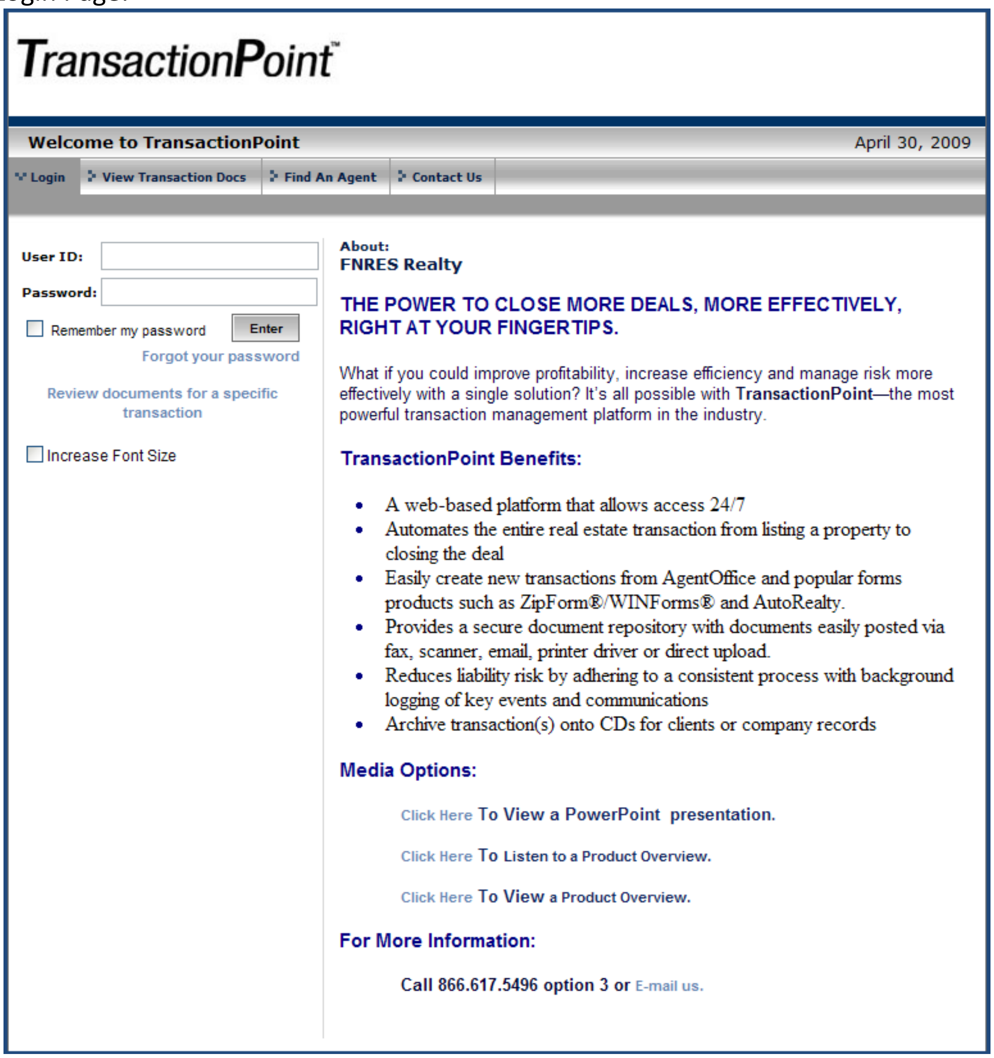
- Archive Transactions (if site admin enables)
- View Orders and their status
- Run Reports
    - Branch, Agent and Activity Report
- Manage View Only Agent User profile and password
    - Establish transaction summary report delivery schedule

Logging In

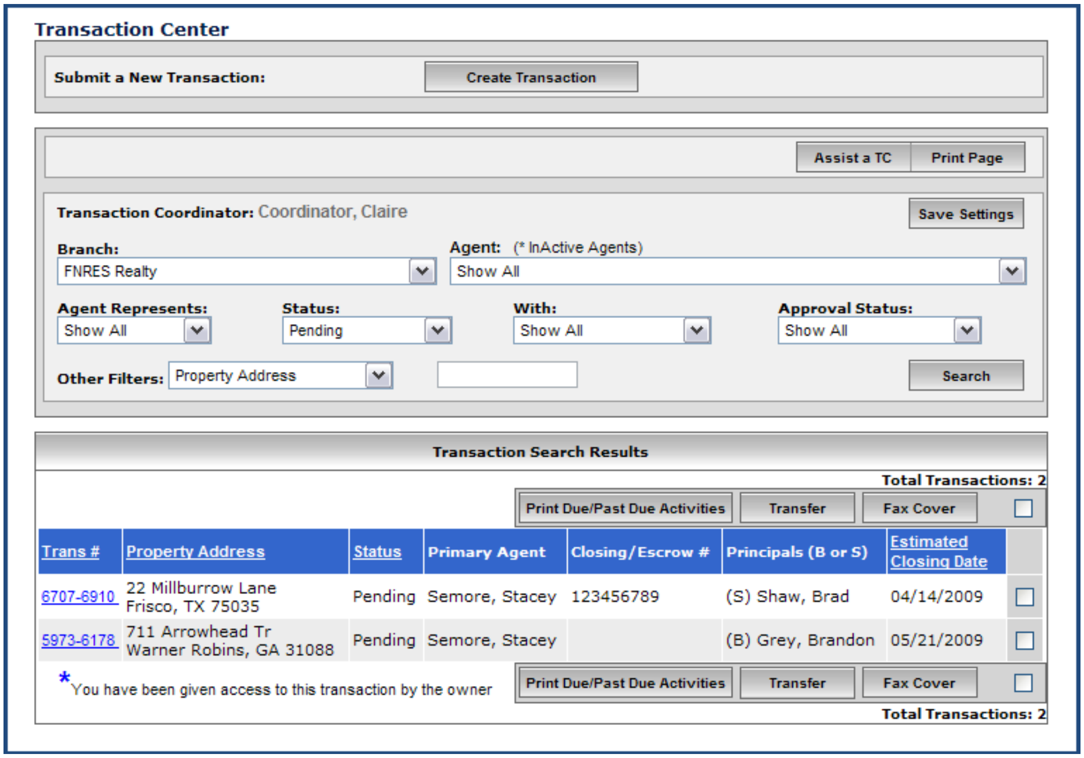
Each site is assigned a unique URL. You may need to contact your site administrator to obtain the URL assigned to your TransactionPoint site. Usernames and Passwords are maintained by a site administrator. If you do not know your username or password, you should contact your site administrator for assistance.

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.

Typical Login Page:

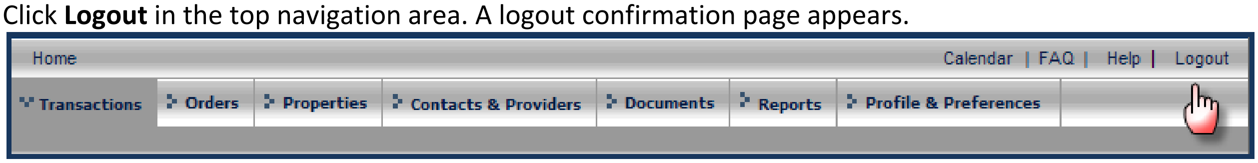


6. Click **Enter.** The **Transaction Center** page appears.



Logging Out

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



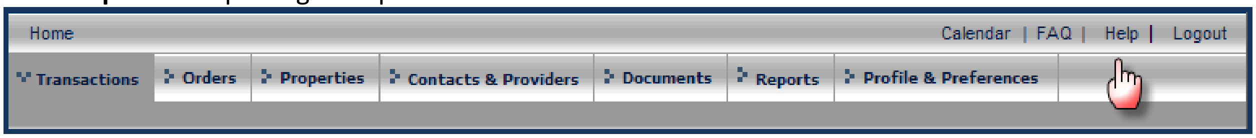
2. A confirmation window displays. ***Tip****: due to the sensitive nature of information you are storing on TransactionPoint, you are encouraged to logout of TransactionPoint whenever you leave your computer.*
3. Click **OK** to confirm you wish to exit TransactionPoint. You will be returned to the login page.

Getting Help

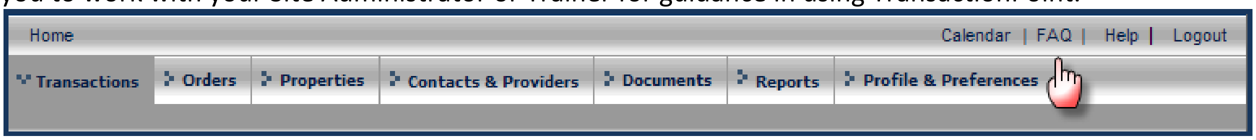
The **HELP** section contains the following useful information:

1. Latest Release Notes
2. Video Notes – helpful videos on how to use the system
3. The most recent user guides

Click **Help** in the top navigation panel to view this useful information.



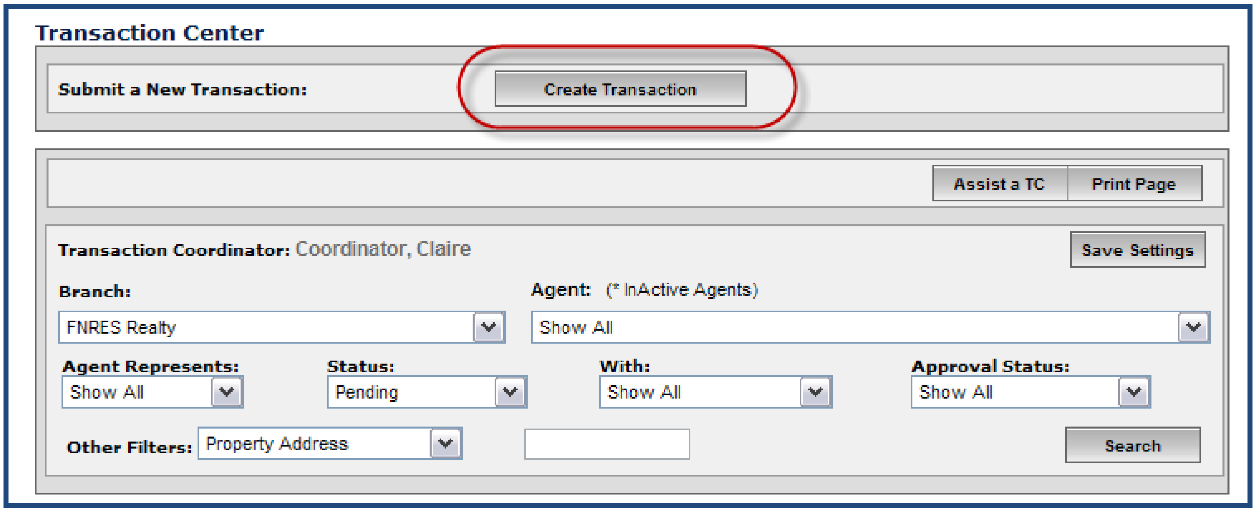
Click **FAQ** to obtain answers to frequently asked questions. The TransactionPoint Team encourages you to work with your Site Administrator or Trainer for guidance in using TransactionPoint.



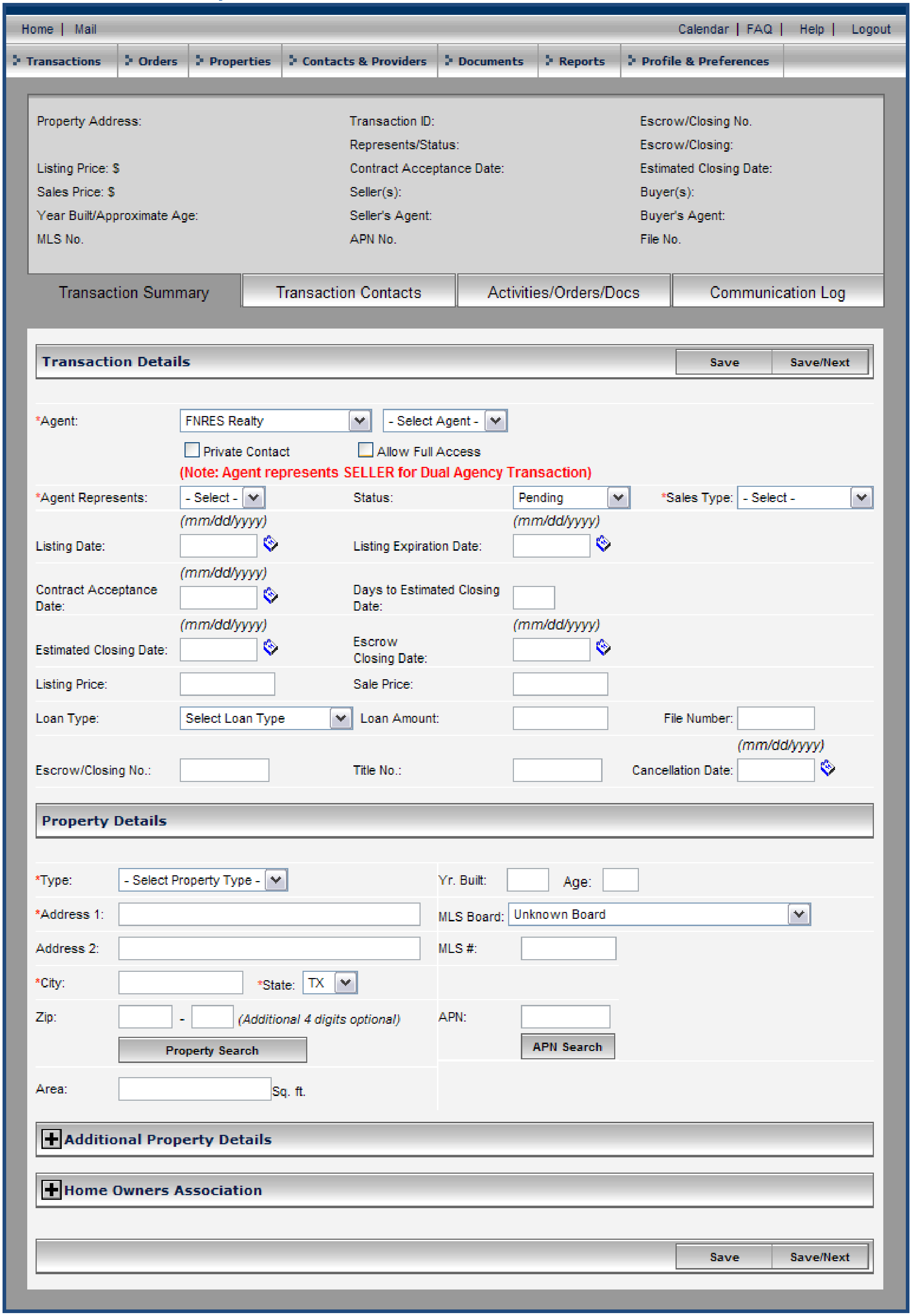
Creating a Transaction Basics

TransactionPoint offers several options for creating a transaction. The following instructions document the typical process for manually entering a transaction. See the **Additional Features** section of this guide for creating a transaction through additional methods such as WinForms/ZipForms, Datasheet, Agent Office, etc.

Click **Create Transaction**.



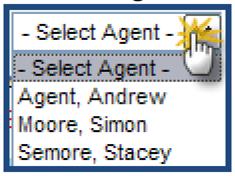
Transaction Summary



Transaction Details

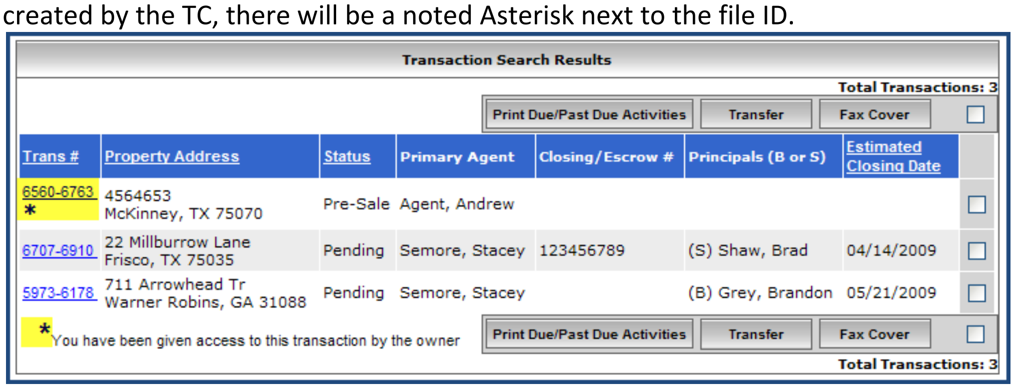
1. Select the **Branch**. The Site Admin determines what branch offices you have access too. Those offices will be displayed in this menu.

2. Select an **Agent.** Choose the agent you wish to create the file for.



Optional:

- Private Contact will restrict others from viewing the user's contact information
- Allow Full Access can be granted to Full Access Agents you may have selected from the drop down menu. By default, a TC creating a file for the Full Access Agent User Type will automatically make the file "view only" to the agent regardless of their access level. By selecting this box, this will allow both the TC and the Full Access Agent full management rights to the file.
    - For those files where the Full Access Agent has been granted Full Access to a file created by the TC, there will be a noted Asterisk next to the file ID.



Transaction Search Results

Total Transactions: 3

Print Due/Past Due Activities | Transfer | Fax Cover

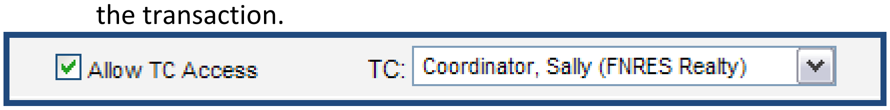
Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date
6560-6763 *	4564653 McKinney, TX 75070	Pre-Sale	Agent, Andrew			
6707-6910	22 Millburrow Lane Frisco, TX 75035	Pending	Semore, Stacey	123456789	(S) Shaw, Brad	04/14/2009
5973-6178	711 Arrowhead Tr Warner Robins, GA 31088	Pending	Semore, Stacey		(B) Grey, Brandon	05/21/2009

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

Print Due/Past Due Activities | Transfer | Fax Cover

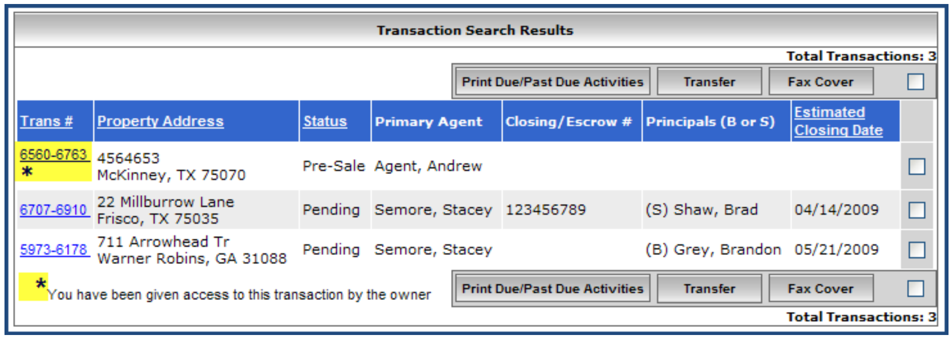
Total Transactions: 3

    - Full Access Agents can assign a Transaction Coordinator to a transaction.
        - Select the **Allow TC Access** check box.
        - 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.



Transaction Search Results

Total Transactions: 3

Print Due/Past Due Activities | Transfer | Fax Cover

Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date
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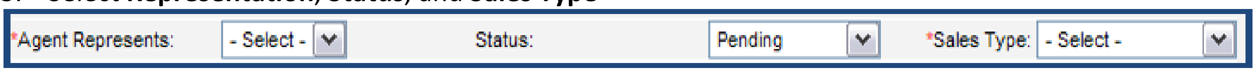
*You have been given access to this transaction by the owner

Print Due/Past Due Activities | Transfer | Fax Cover

Total Transactions: 3

3. Select **Representation**, **Status**, and **Sales Type**



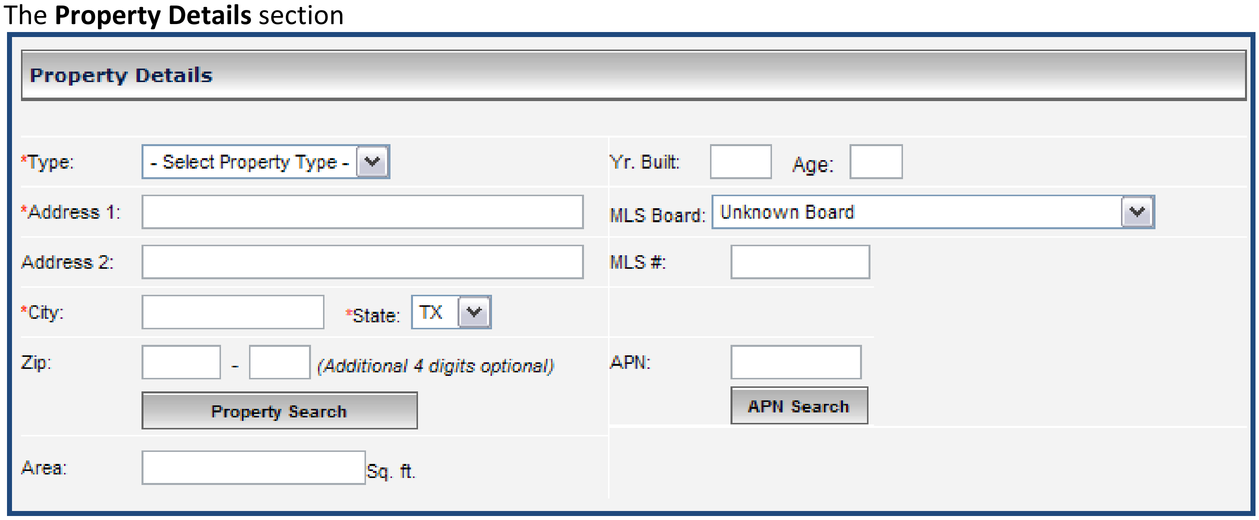
- **Agent Represents** choices: Seller, Buyer, Both and Dual
  (Activity templates are directly correlated to representation.)
- **Status** choices: Pre-Sale or Pending

4. The following items are **Optional**.
   a. Listing Date
   b. Listing Expiration Date
   c. Contract Acceptance Date
   d. Days to Estimated Closing
   e. Estimated Closing Date
   f. Escrow Closing Date
   g. Listing Price
   h. Sale Price
   i. Loan Type
   j. Loan Amount
   k. File Number
   l. Escrow/Closing Number
   m. Title Number
   n. Cancellation Date

Note: Items noted with a red * are required to create the transaction.

Property Details

The **Property Details** section



Note: Items noted with a red * are required to create the transaction.

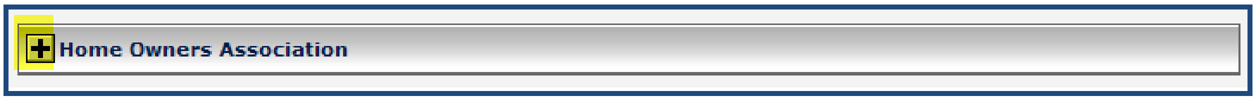
5. Choose **Property Type** from the drop down menu of choices
6. Enter the Property **Address**
7. Enter the **City**
8. Choose **State** from the drop down menu of choices

Optional: Zip Code, Area (Square Footage), Year Built (age will auto-calculate for you), MLS Board, MLS # and APN. See **Additional Features** on how to import data that will pre-populate these fields.

Additional Property Details

Click the plus sign next to **Additional Property Details** to enter additional details, property specifications or property occupancy information.

Home Owners Association



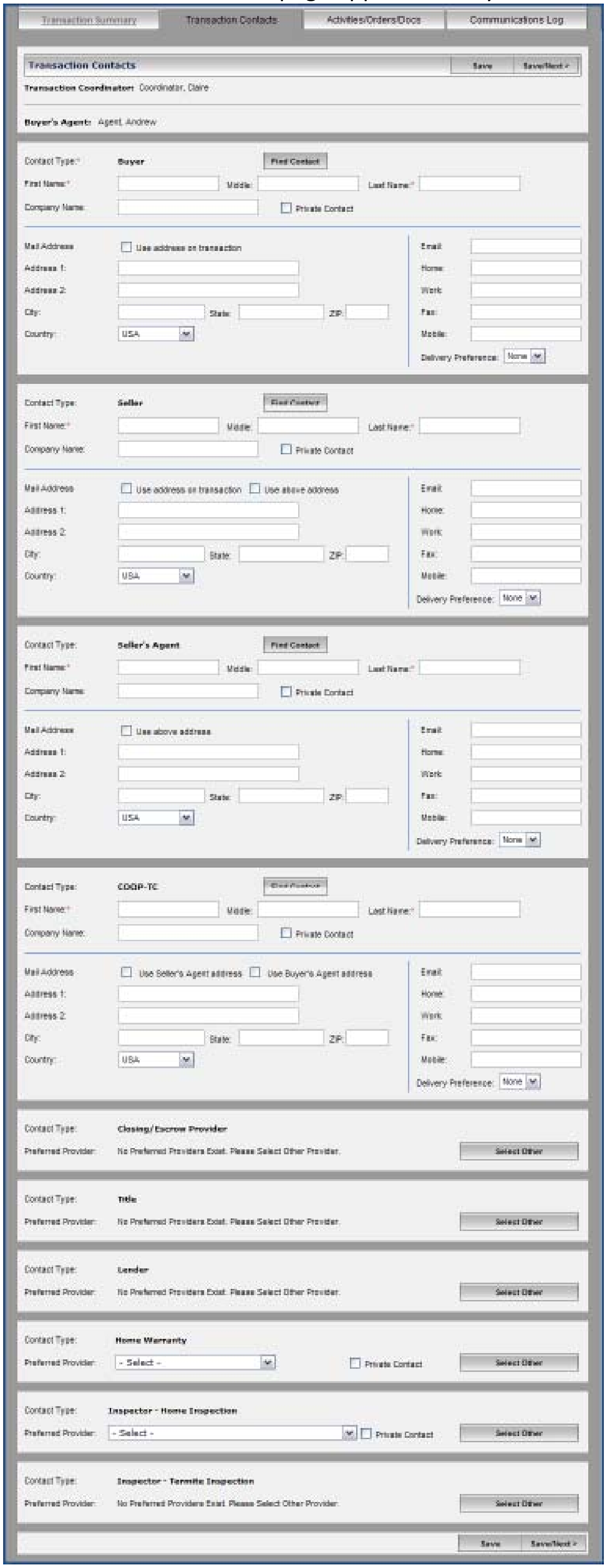
Click the plus sign next to **Home Owners Association** to enter Home Owners Association information.

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

9. Click **Save** to save the information, or **Save/Next** to move to the next page in the transaction creation process.

Transaction Contacts

The **Transaction Contacts** page appears after you have selected **Save/Next**



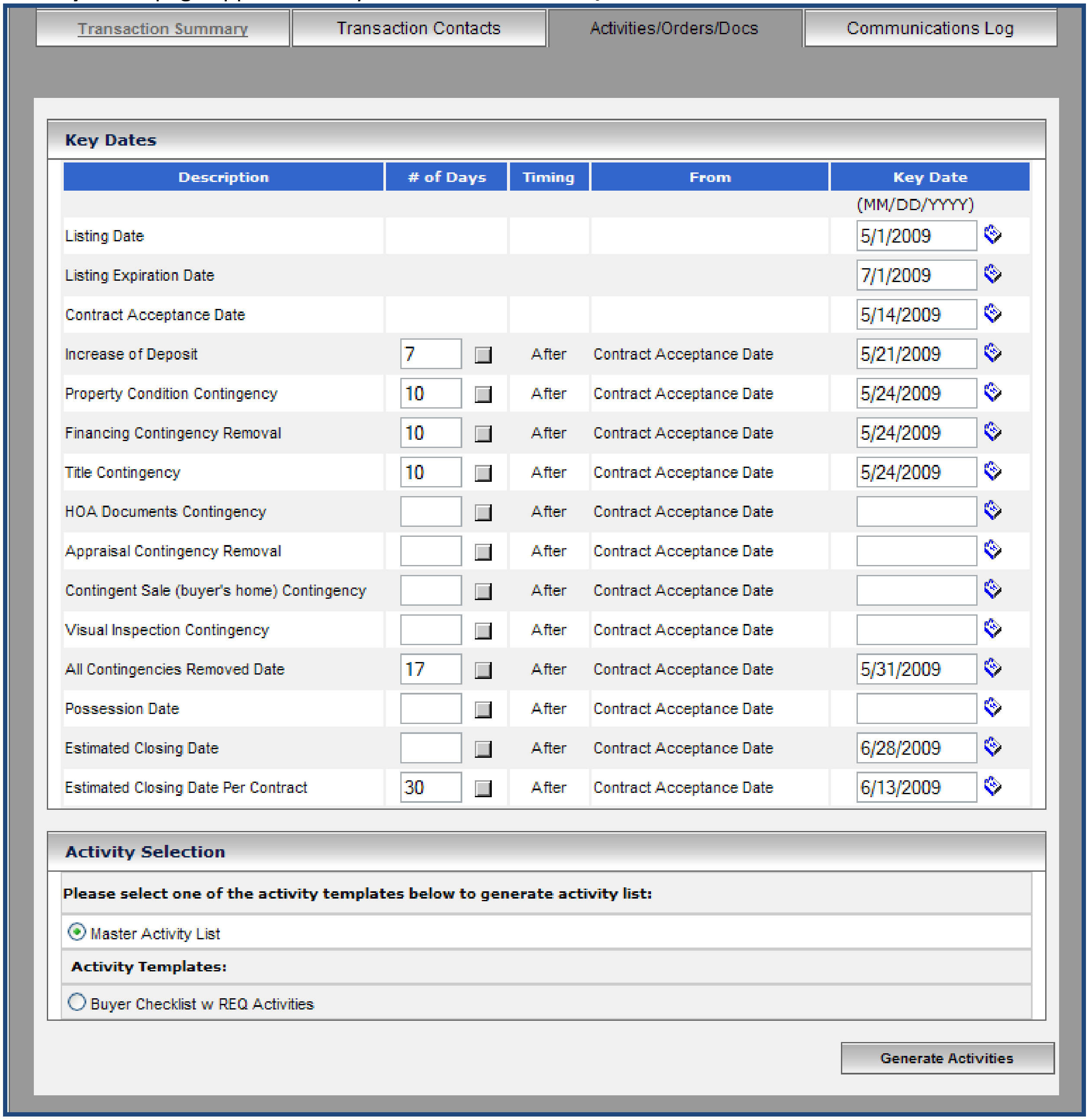
Complete the requested information. Only the names are required. Click **Find Contact** to search existing contacts if the Seller or Buyer has been involved in a prior transaction.

> **Note:** If the Site Admin has set up preferred providers for the office your agent belongs to, you will be able to select one of them from a drop down menu to add to your file. You may **Select Other** if you do not find your service provider in the menu of choices provided. You do not have to add service providers at this time. See **Adding Providers** for more information.

10. Click **Save/Next**.

Key Dates

The **Key Dates** page appears after you have selected **Save/Next**.



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

Key Dates

Description	# of Days	Timing	From	Key Date (MM/DD/YYYY)
Listing Date				5/1/2009
Listing Expiration Date				7/1/2009
Contract Acceptance Date				5/14/2009
Increase of Deposit	7	After	Contract Acceptance Date	5/21/2009
Property Condition Contingency	10	After	Contract Acceptance Date	5/24/2009
Financing Contingency Removal	10	After	Contract Acceptance Date	5/24/2009
Title Contingency	10	After	Contract Acceptance Date	5/24/2009
HOA Documents Contingency		After	Contract Acceptance Date	
Appraisal Contingency Removal		After	Contract Acceptance Date	
Contingent Sale (buyer's home) Contingency		After	Contract Acceptance Date	
Visual Inspection Contingency		After	Contract Acceptance Date	
All Contingencies Removed Date	17	After	Contract Acceptance Date	5/31/2009
Possession Date		After	Contract Acceptance Date	
Estimated Closing Date		After	Contract Acceptance Date	6/28/2009
Estimated Closing Date Per Contract	30	After	Contract Acceptance Date	6/13/2009

Activity Selection

Please select one of the activity templates below to generate activity list:

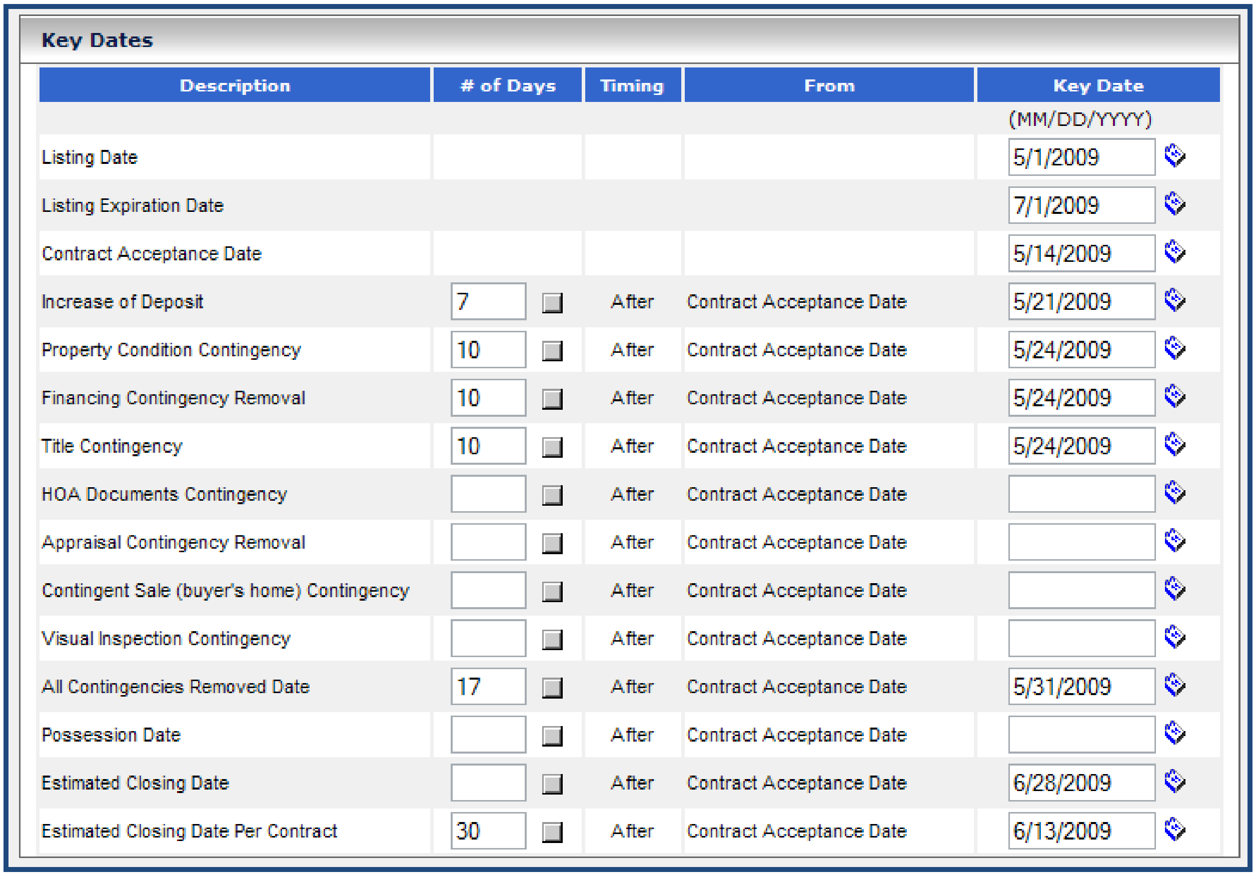
Master Activity List

Activity Templates:

Buyer Checklist w REQ Activities

Generate Activities

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



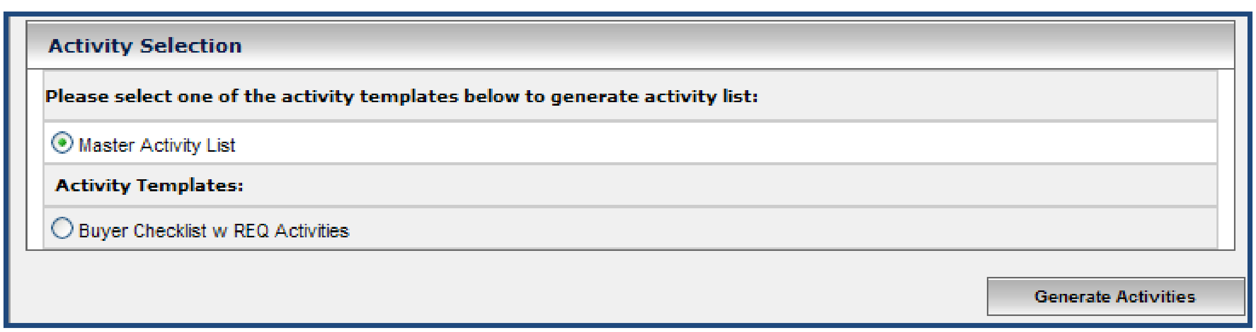
Key Dates

Description	# of Days	Timing	From	Key Date (MM/DD/YYYY)
Listing Date				5/1/2009
Listing Expiration Date				7/1/2009
Contract Acceptance Date				5/14/2009
Increase of Deposit	7	After	Contract Acceptance Date	5/21/2009
Property Condition Contingency	10	After	Contract Acceptance Date	5/24/2009
Financing Contingency Removal	10	After	Contract Acceptance Date	5/24/2009
Title Contingency	10	After	Contract Acceptance Date	5/24/2009
HOA Documents Contingency		After	Contract Acceptance Date	
Appraisal Contingency Removal		After	Contract Acceptance Date	
Contingent Sale (buyer's home) Contingency		After	Contract Acceptance Date	
Visual Inspection Contingency		After	Contract Acceptance Date	
All Contingencies Removed Date	17	After	Contract Acceptance Date	5/31/2009
Possession Date		After	Contract Acceptance Date	
Estimated Closing Date		After	Contract Acceptance Date	6/28/2009
Estimated Closing Date Per Contract	30	After	Contract Acceptance Date	6/13/2009

Note: The System Administrator can set up default key dates and descriptions. You can modify the # of Days calculation or actual Key Date, if needed.

11. Either enter the **# of Days from Acceptance Date** and click the grey box to auto-calculate the key date or you may enter the **Key Date** manually.
12. Select the **Template** you wish to apply to this transaction.

Note: Templates are set up by the Site Administrator if you are a TP Professional client. If you are a TP Standard client, you may set up your own activity templates. The **Set Up** link allows you to customize your own templates. TP Standard customers should reference the Site Admin User guide for more information on setting up your activity templates.

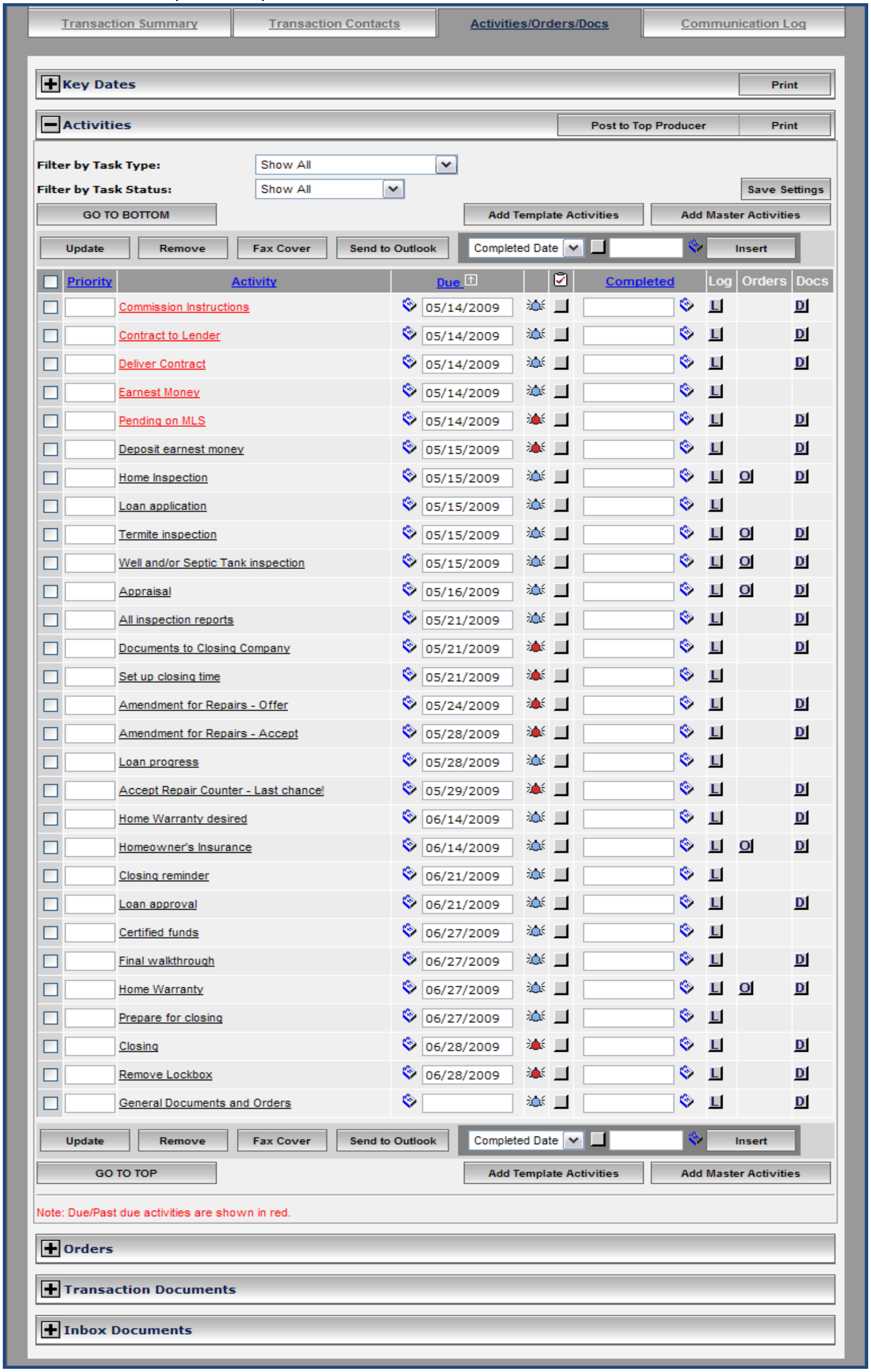


13. Click **Generate Activities**

Note: The System Administrator can set up a master activity list or individual activity templates.

Activities

The **Activities/Orders/Docs** page appears once you have selected your template showing the complete list of activities required to process this transaction.



Essential Tasks

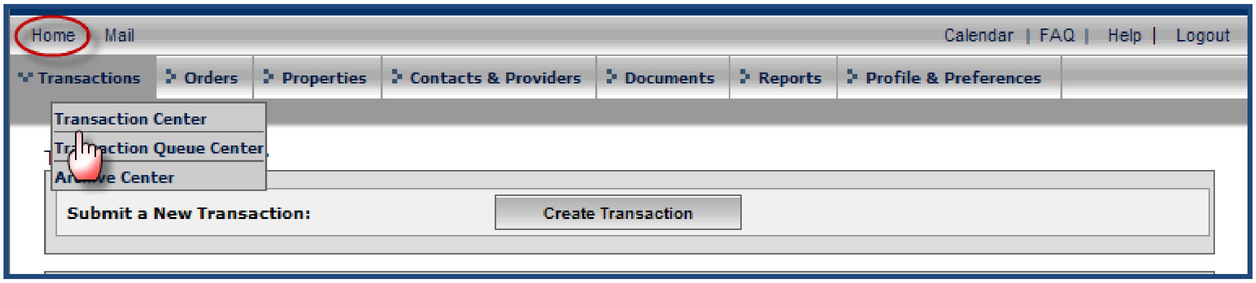
Transaction Center

The Transaction Center is your starting point after you log into TransactionPoint. Within the Transaction Center, you can:

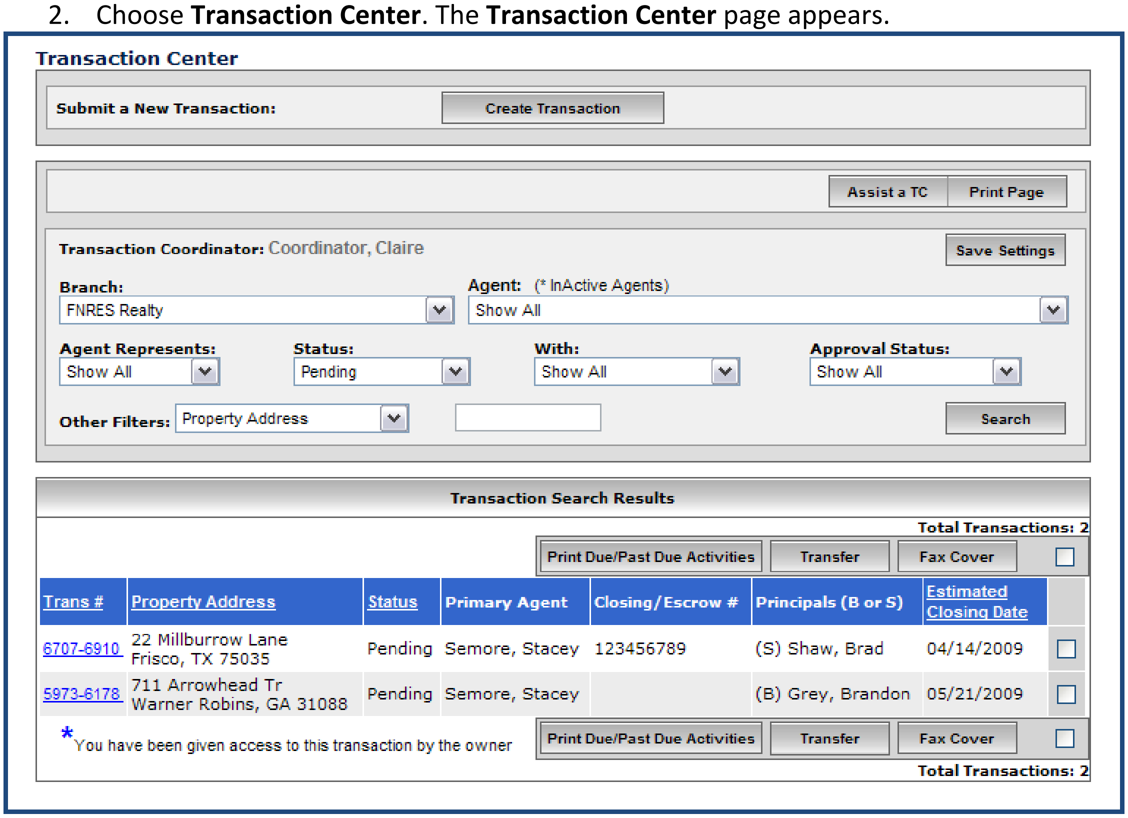
1. Create Transactions
2. Assist another Transaction Coordinator with their transactions
3. Search for transactions
4. View / Access your transactions
5. Print Due/Past Due activities
6. Transfer files to another Transaction Coordinator
7. Print Fax Coversheets for your displayed transactions

To access the Transaction Center:

1. Click the **Transactions** tab located in the main navigational toolbar. You may also click **HOME** for the same results.



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



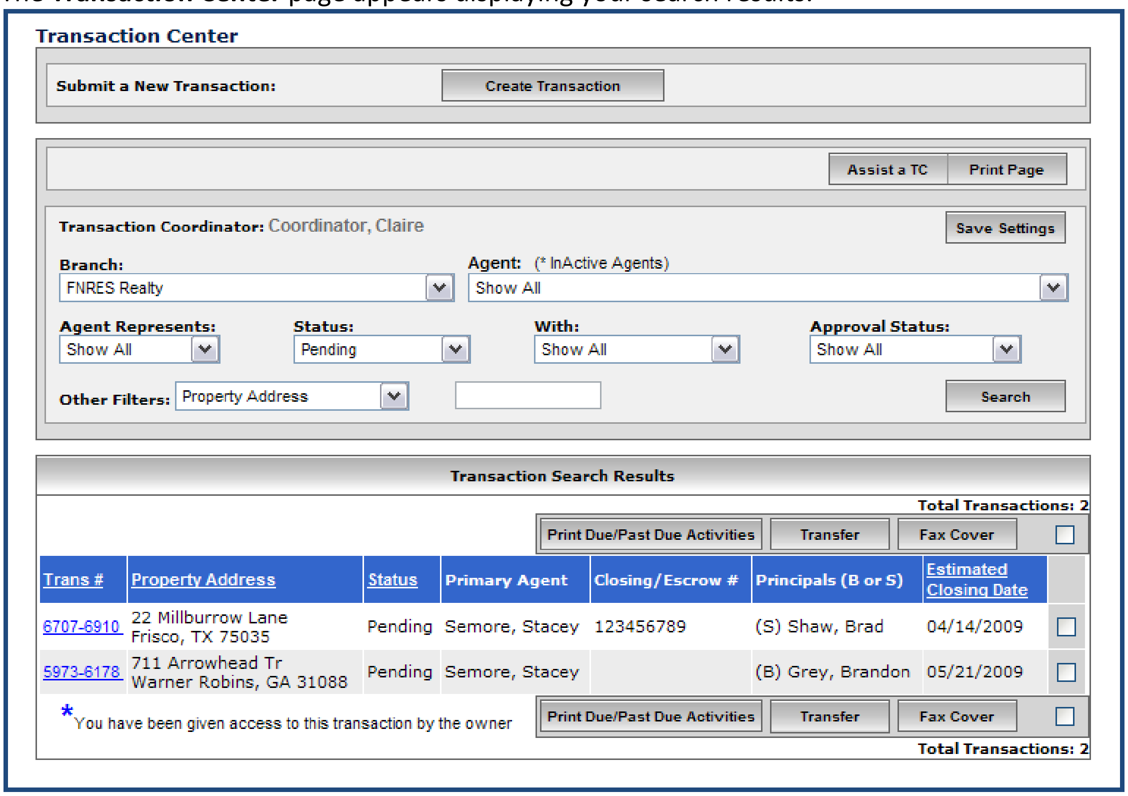
Searching Transactions

You may search for transactions by:

- Branch – Branches you are authorized to access will be displayed
- Agent – Agents you are authorized to access will be displayed
- Representation (Buyer, Seller, Dual, Both)
- Status – These fields may be customized by the Site Administrator and therefore will vary.
- With (Activity Sort) – Allows you to sort transactions by activities that are due today, completed, past due, etc.
- Approval Status – If your Site Administrator set up activities that require approval, you will be able to sort your transactions by Approved, Resubmit, Resubmitted and a combination of Resubmit/Resubmitted.
- Other Filters – If you wish to search by File ID, Property Address, etc., the **Other Filters** allow to search this additional criteria

Select the appropriate search criteria for the transaction, click **Search**

The **Transaction Center** page appears displaying your search results.

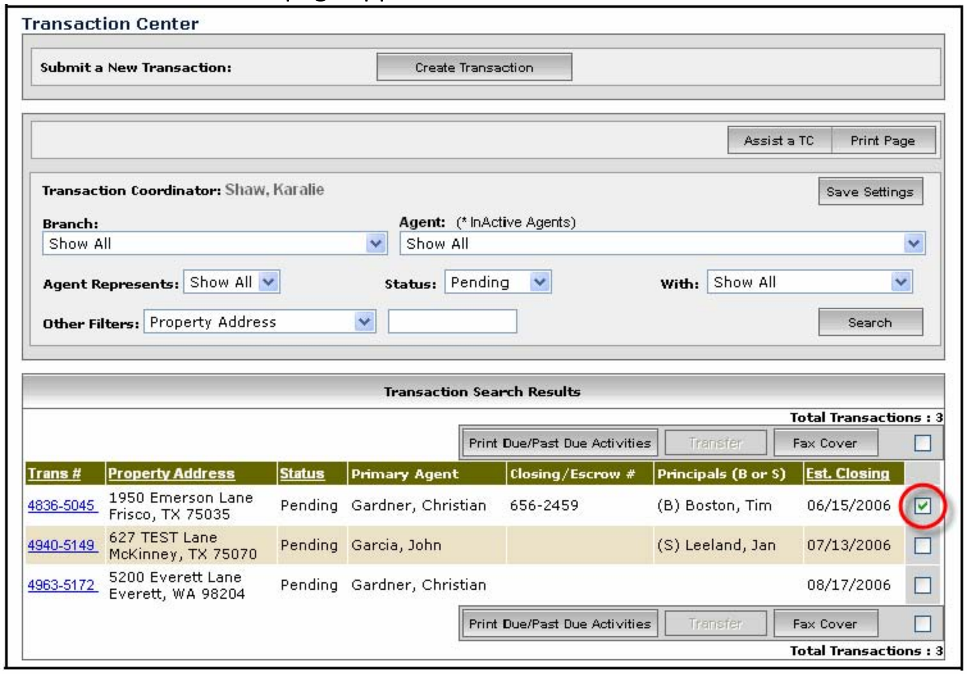


Printing Due/Past Due Activities

You can easily view what tasks are past due or due today by running a simple report.

1. Click the **Transactions** tab.
2. Click **Transaction Center**. You may also click **Home** as this will bring you to the Transaction Center as well.

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**.

Note: You can run this report for any number of transactions you select. The report will break down your activities by property.

Note: If you experience difficulty displaying your report, you may want to disable your pop-up blockers for your site. To bypass pop-up blockers, you should hold down your ***Control Key*** while selecting the action **Print Due/Past Due Activities.**

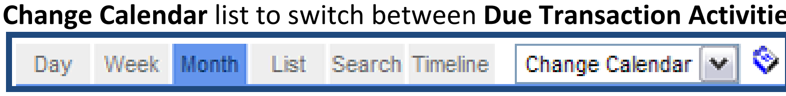
Calendar

The **Calendar** feature of TransactionPoint allows you to view your Key Dates and activities by the day, by the week or by the month. You may also search for activities and add Events to your calendar. Calendars may be exported for convenience.

To access the Calendar, click the **Calendar** link in the main navigational toolbar. (This feature can be turned on from your **User Profile** page.)

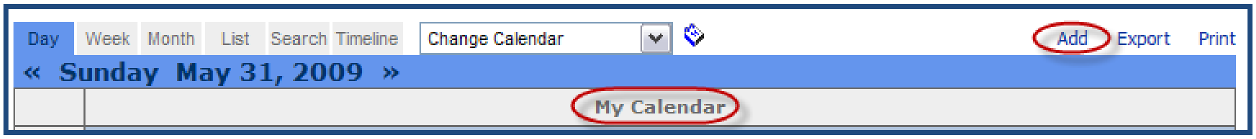
Sample **Calendar** *monthly* view.

Note: 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**.



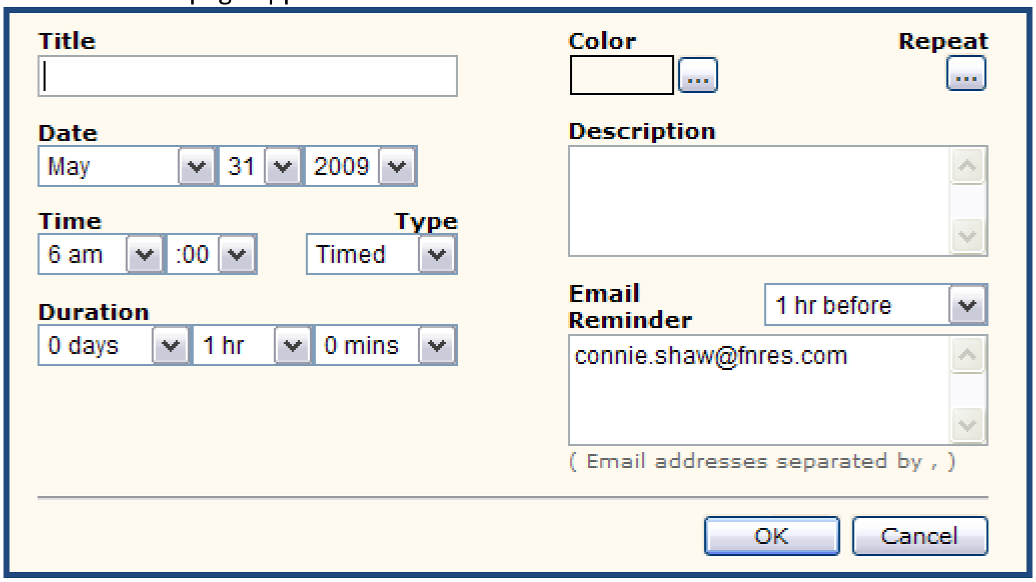
Adding an Event

You can add events to your calendar. You can only schedule items using **My Calendar**. These events are not added to transactions and are only for display on your **My Calendar**.



1. Click Add.

The **New Event** page appears

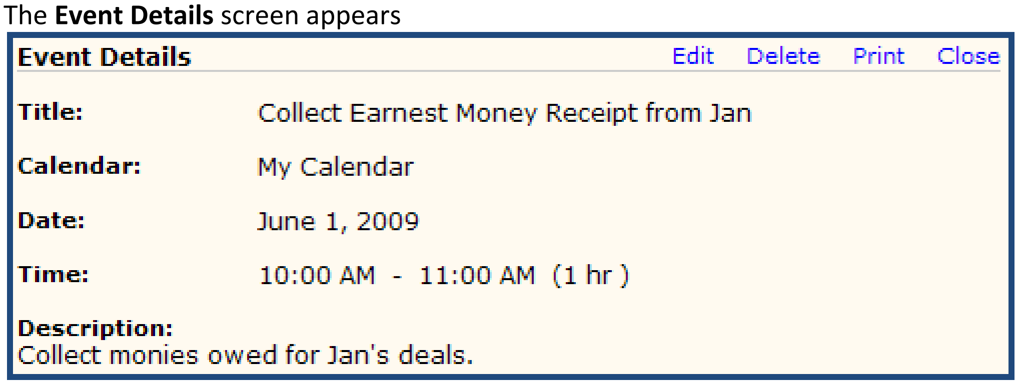


2. Complete the **Event** fields.
3. Click **OK** to add the event. The calendar reappears showing the event added.

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**.

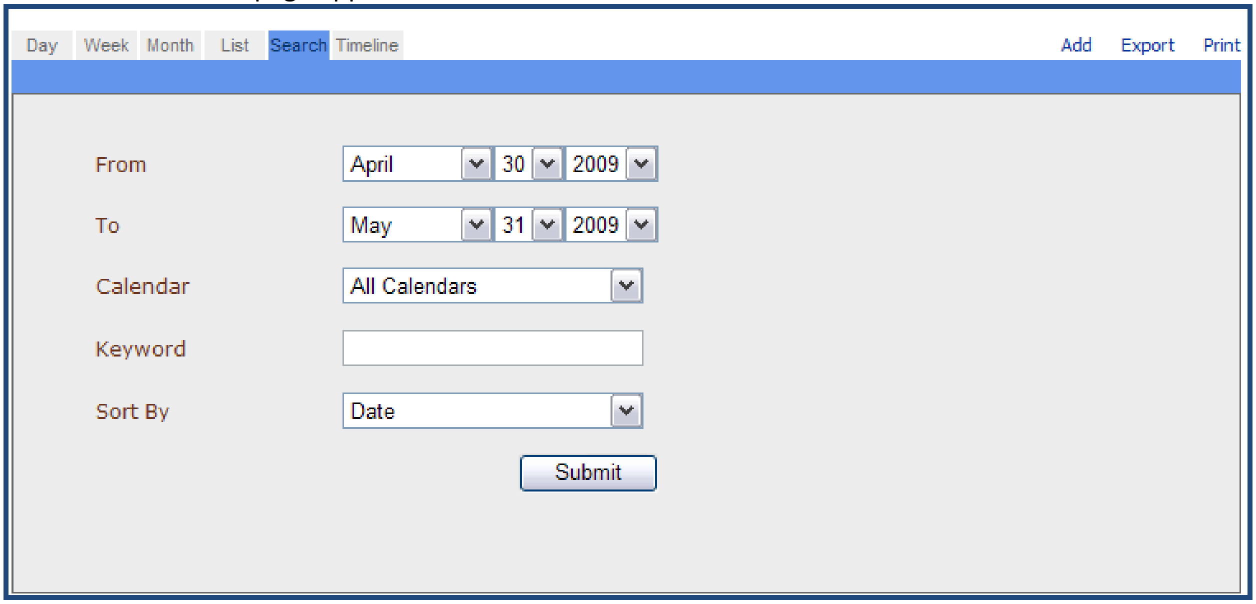
Deleting an Event

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

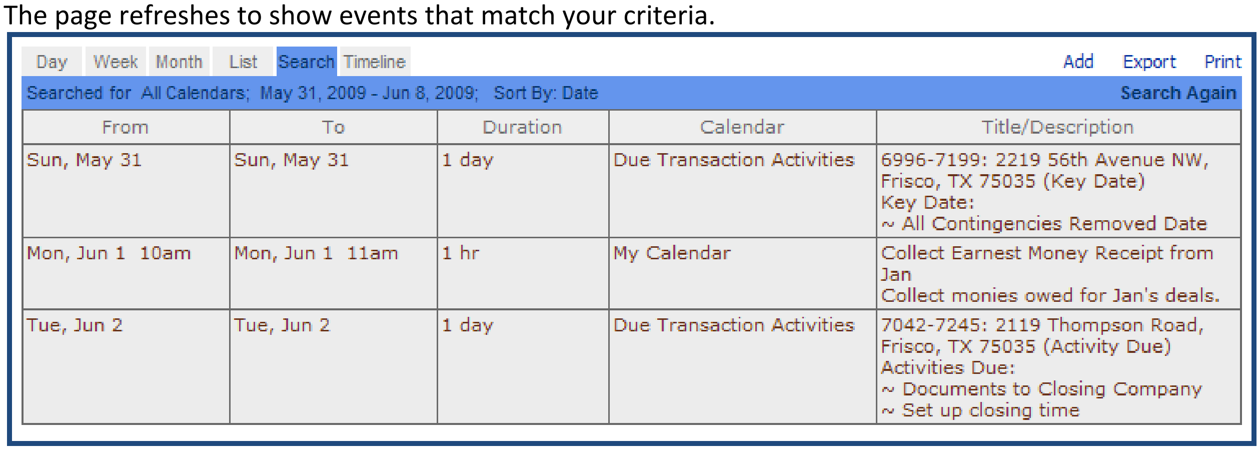
1. Click **Search** at the top of the calendar

The **Calendar Search** page appears.



2. Enter the search criteria.
3. Click **Submit**.

The page refreshes to show events that match your criteria.

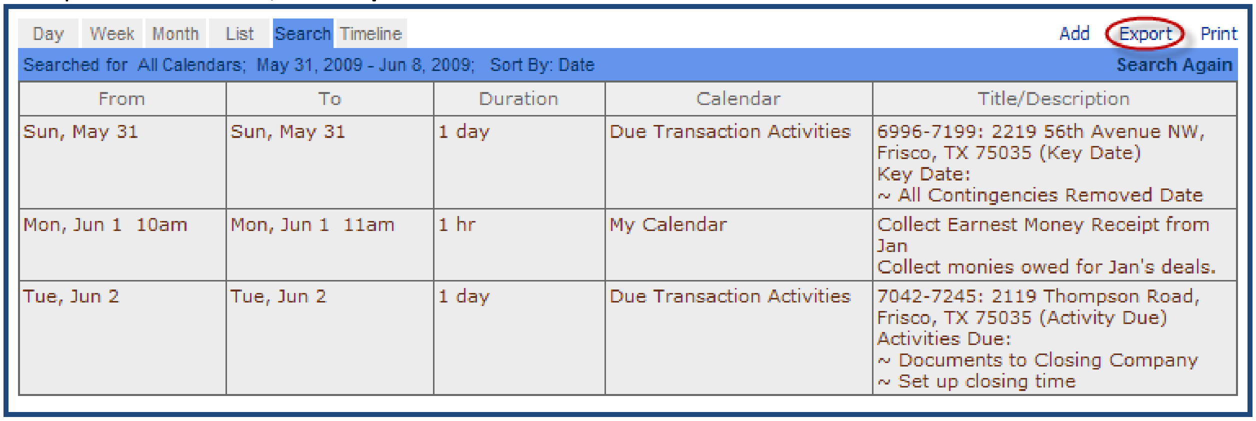


From	To	Duration	Calendar	Title/Description
Sun, May 31	Sun, May 31	1 day	Due Transaction Activities	6996-7199: 2219 56th Avenue NW, Frisco, TX 75035 (Key Date) Key Date: ~ All Contingencies Removed Date
Mon, Jun 1 10am	Mon, Jun 1 11am	1 hr	My Calendar	Collect Earnest Money Receipt from Jan Collect monies owed for Jan's deals.
Tue, Jun 2	Tue, Jun 2	1 day	Due Transaction Activities	7042-7245: 2119 Thompson Road, Frisco, TX 75035 (Activity Due) Activities Due: ~ Documents to Closing Company ~ Set up closing time

Exporting Calendar Entries

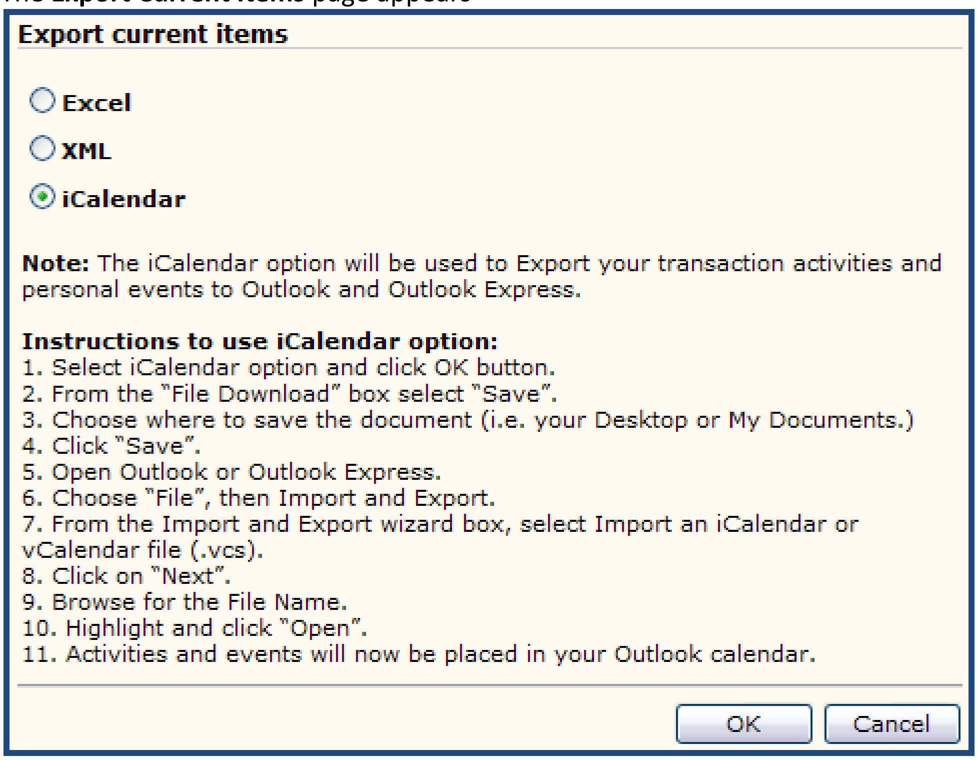
You can export transaction activities and personal events to Microsoft Excel, XML or iCalendar format. Use the iCalendar format to export to Microsoft Outlook or Outlook Express.

To export the calendar, click **Export**.



From	To	Duration	Calendar	Title/Description
Sun, May 31	Sun, May 31	1 day	Due Transaction Activities	6996-7199: 2219 56th Avenue NW, Frisco, TX 75035 (Key Date) Key Date: ~ All Contingencies Removed Date
Mon, Jun 1 10am	Mon, Jun 1 11am	1 hr	My Calendar	Collect Earnest Money Receipt from Jan Collect monies owed for Jan's deals.
Tue, Jun 2	Tue, Jun 2	1 day	Due Transaction Activities	7042-7245: 2119 Thompson Road, Frisco, TX 75035 (Activity Due) Activities Due: ~ Documents to Closing Company ~ Set up closing time

The **Export Current Items** page appears



1. Select the format.
2. Click **OK**.
3. Click **Save**.
4. Select where you want to save the file.
5. Click **Save**.

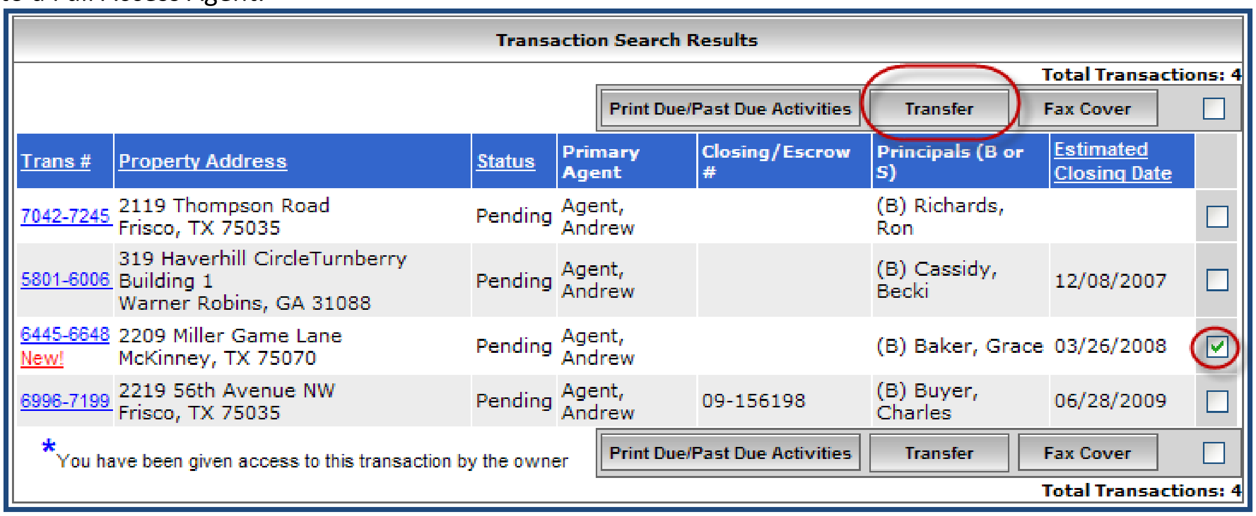
Transferring Transactions

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. The Site Administrator can set up Transaction Coordinator access to multiple branches.

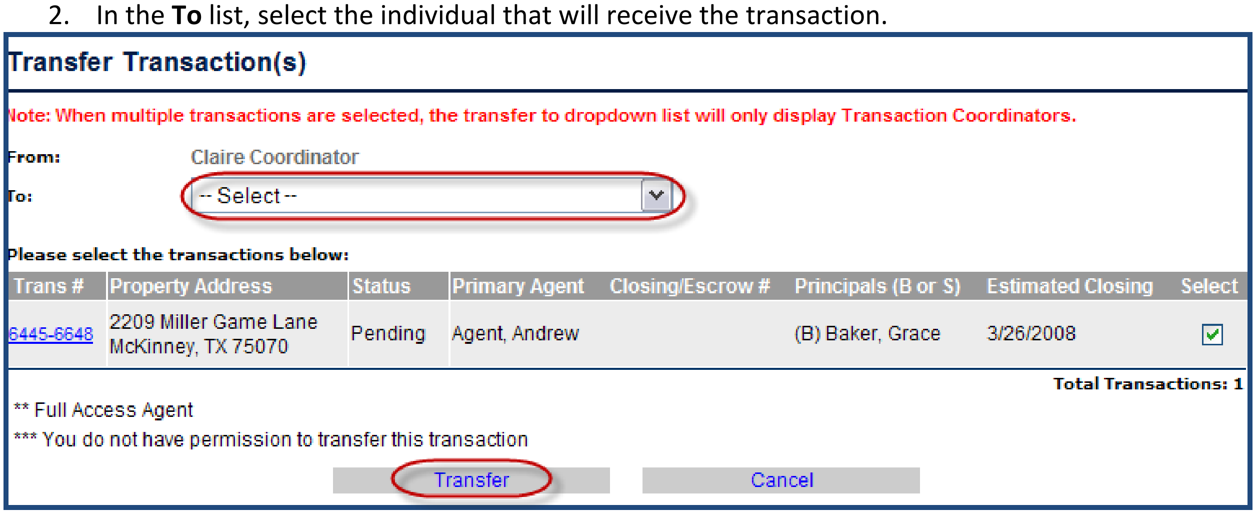
Completing a Transfer

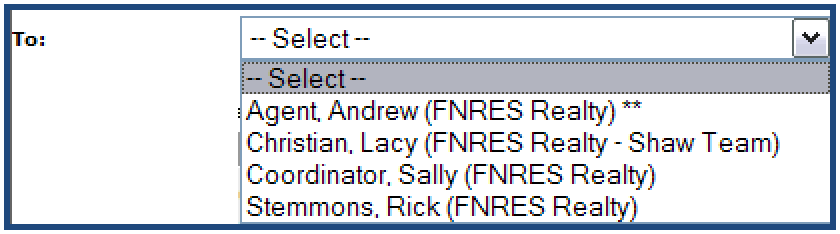
1. In the **Transaction Center** page, select the check box of the transaction you want to transfer and click **Transfer**. Multiple transactions can be transferred to another Transaction Coordinator at the same time by selecting additional check boxes. Multiple transactions cannot be transferred to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

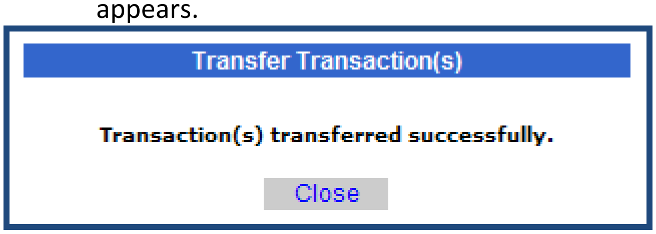


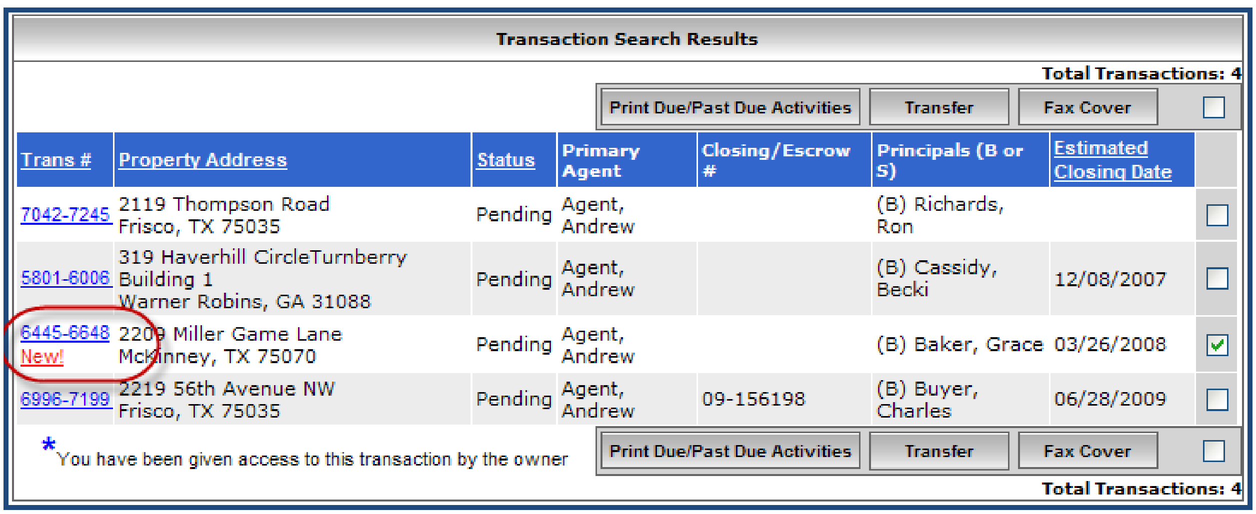


In this example, the first selection is a Full Access Agent, as noted by the asterisks. The second selection is a Transaction Coordinator.

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.



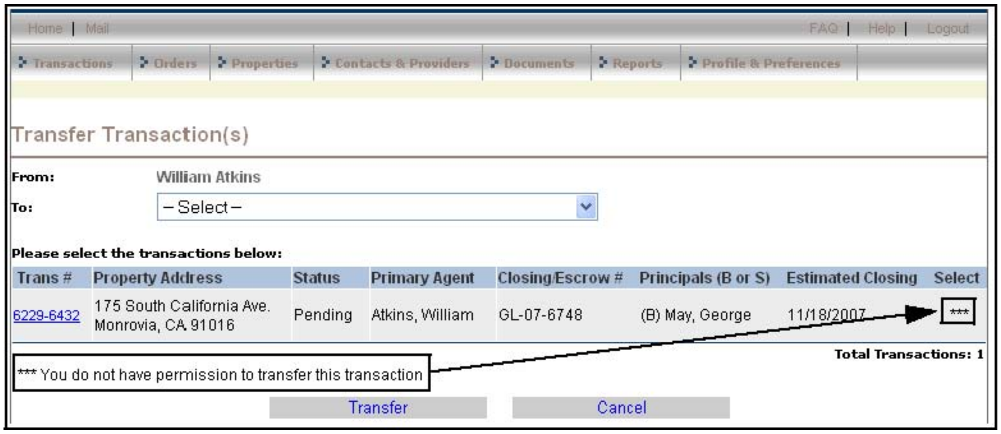


Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date
7042-7245	2119 Thompson Road Frisco, TX 75035	Pending	Agent, Andrew		(B) Richards, Ron	
5801-6006	319 Haverhill CircleTurnberry Building 1 Warner Robins, GA 31088	Pending	Agent, Andrew		(B) Cassidy, Becki	12/08/2007
6445-6648 New!	2209 Miller Game Lane McKinney, TX 75070	Pending	Agent, Andrew		(B) Baker, Grace	03/26/2008
6996-7199	2219 56th Avenue NW Frisco, TX 75035	Pending	Agent, Andrew	09-156198	(B) Buyer, Charles	06/28/2009

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.

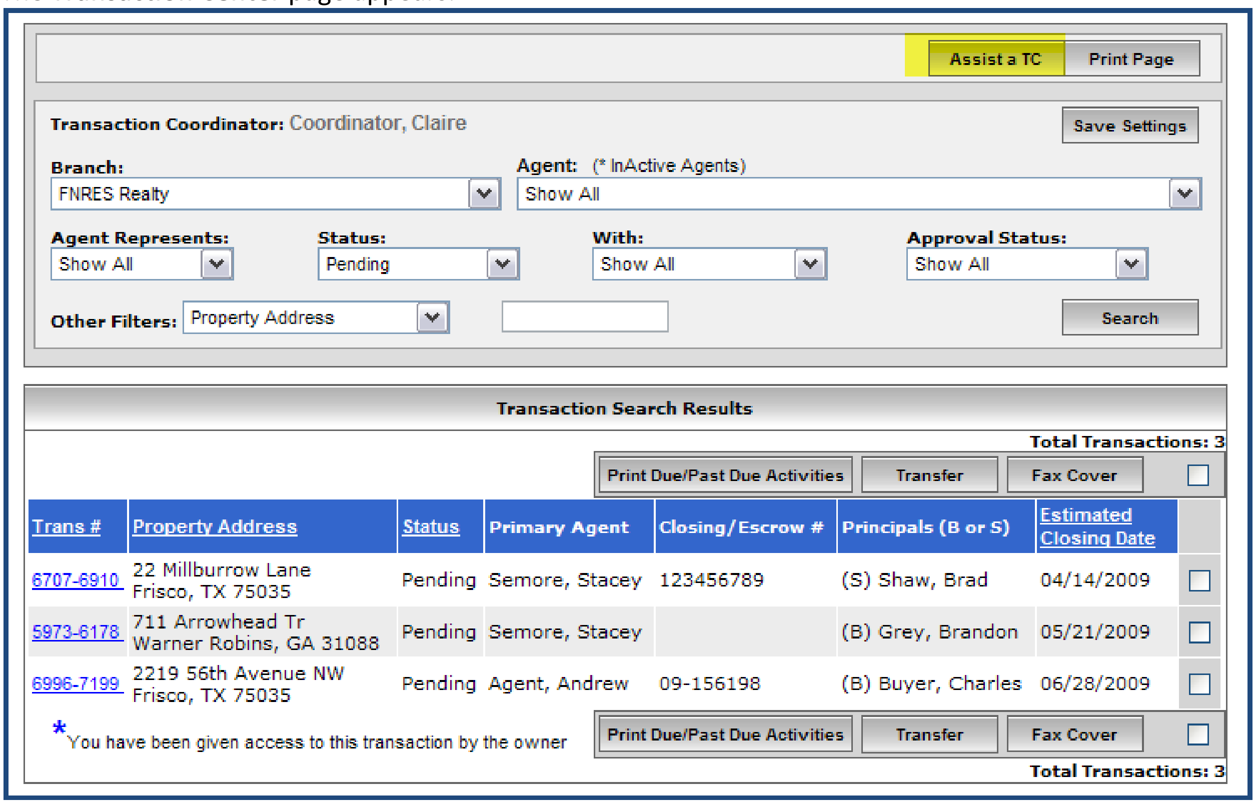
Assisting a Transaction Coordinator

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.

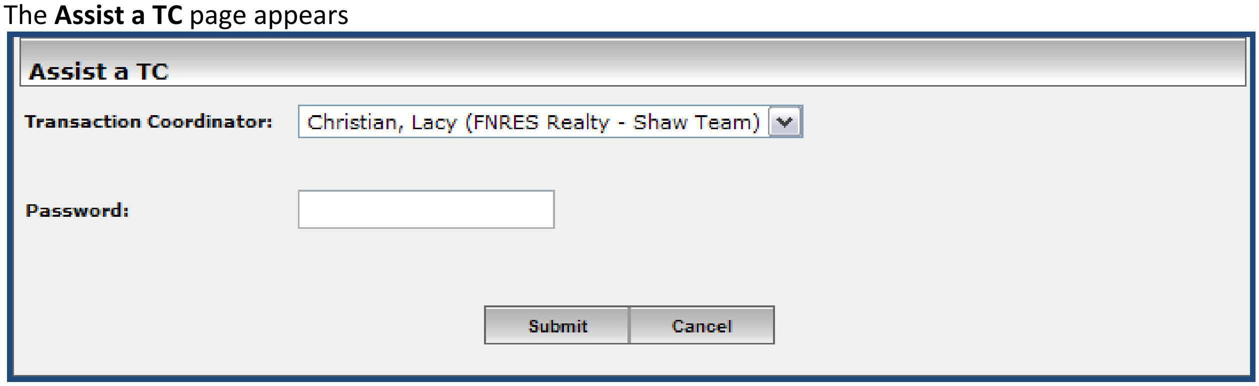
1. Click **Transactions** tab.
2. Click **Transaction Center**. You may also click **Home** from the main toolbar.

The **Transaction Center** page appears.



3. Click **Assist a TC**.

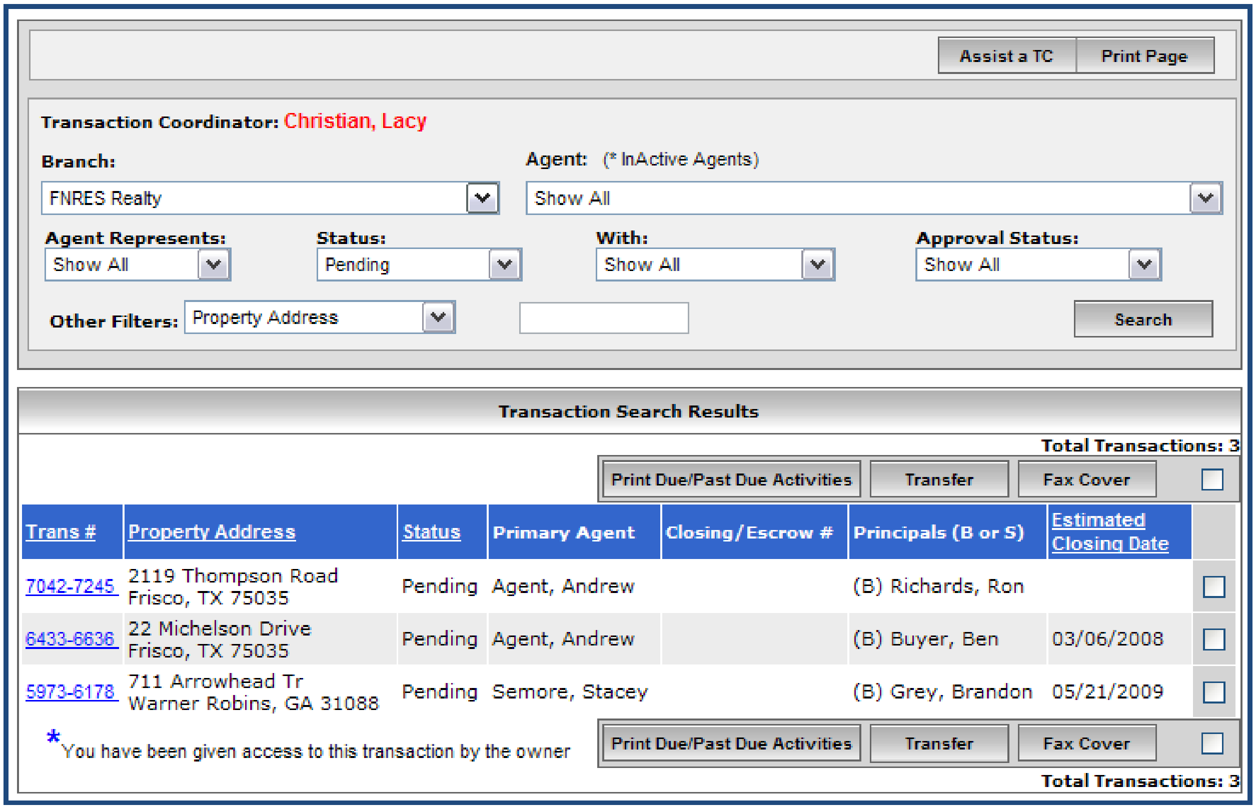
The **Assist a TC** page appears



4. Select the **Transaction Coordinator** from the list.
5. Enter the Assist a TC **Password**. This can be obtained from the TC you are assisting. (If you need to set up the Assist a TC Password, please review the Password portion of this guide.)

6. Click **Submit**.

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



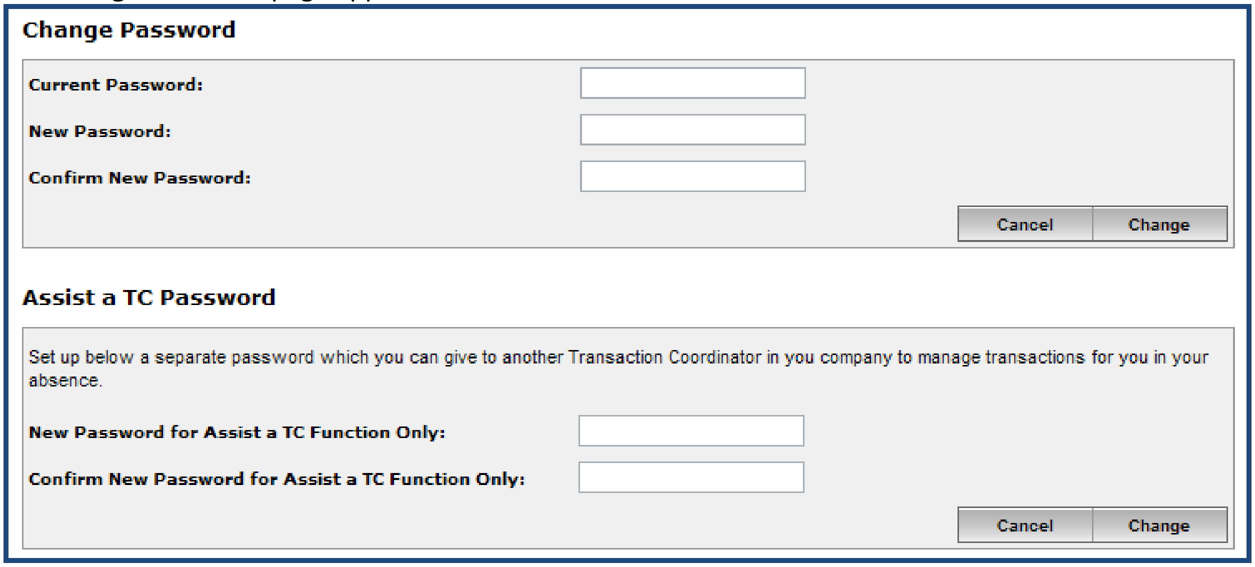
In this example the transaction coordinator owning these transactions is Lacy Christian (displayed in red) and the assisting coordinator is Claire TC.

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.

Assist a TC Password

The Assist a TC Password is designed to allow multiple TC's access to one another's files without sharing system login information. To establish an Assist a TC password, you must be a TC.

1. Click the **Profile & Preferences** tab, and click on **User Passwords**.
   The **Change Password** page appears.

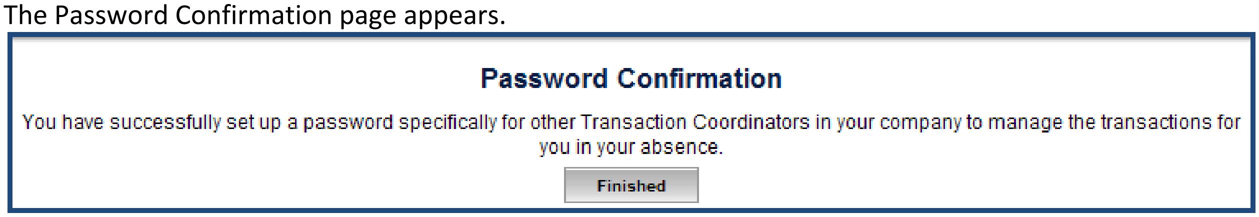


2. Type a password in the **New Password for Assist a TC Function Only** field.
3. Retype the password in the **Confirm New Password** field.
4. Click **Change.**

Note: Provide the **Assist a TC** password to another TC so they may now access your transactions. *See the **Assisting a Transaction Coordinator** portion of this guide for more information.*

Note: If you are not able to modify your **Assist a TC** password, your site administrator may have disabled this feature. Please contact your site administrator for assistance.

The Password Confirmation page appears.

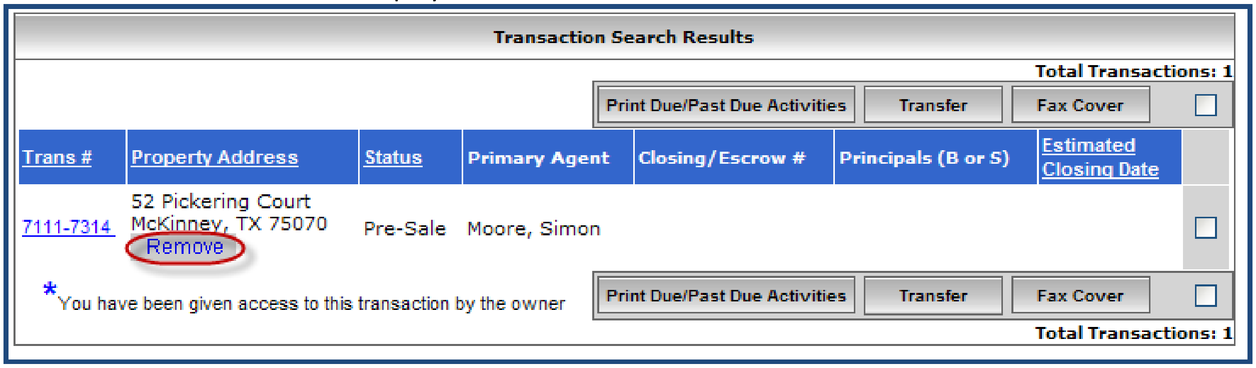


5. Click **Finished**.

Removing a Transaction

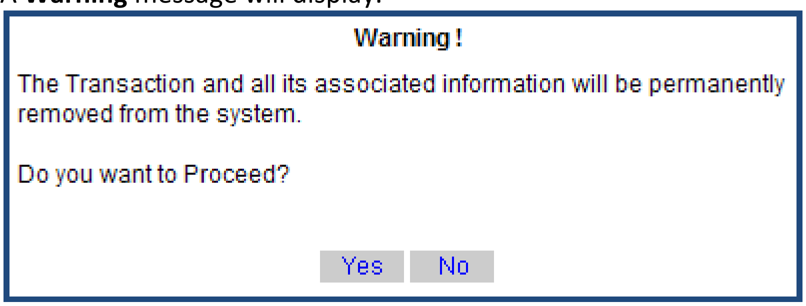
There are two options for removing properties/transactions from TransactionPoint. This business rule applies: if there are documents or orders within a transaction, that property/file cannot be removed.

Files that can be removed are displayed in the Transaction Center with a red **remove** link.



To remove a transaction file from the **Transaction Center**, locate the file you wish to remove and choose the option **Remove.**

A **Warning** message will display.



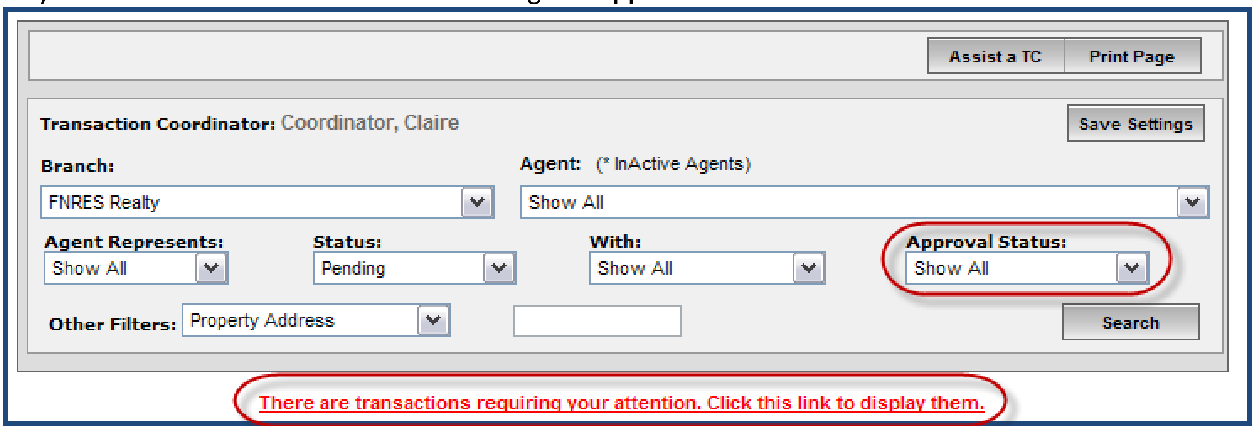
Click **Yes** to confirm you wish to remove the file permanently from the system. Click **No** to cancel.

Note: You can remove properties from the **Property Center**. See the **Property Center** section of this guide for more information.

Reviewing Transactions flagged by an Administrator

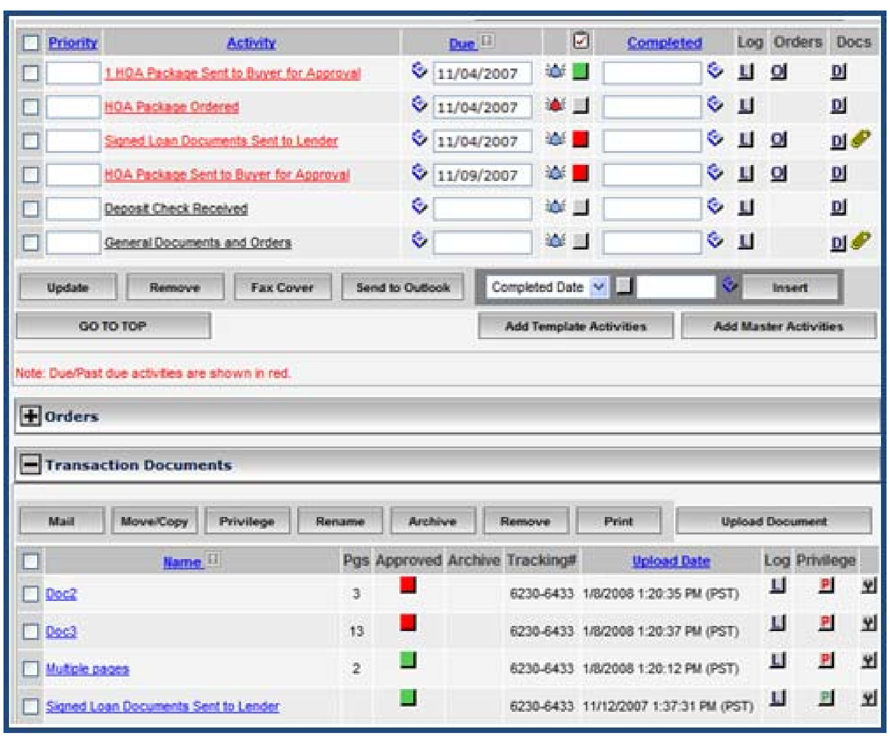
The Site Admin has the ability to establish whether or not an activity/document requires approval. When this feature is enabled for specific activities, the TC/FAA has the ability to review transactions that require attention. This feature is not available in TP Standard Edition.

If a Site Super User or Branch Executive (SSU/BX) reviews a transaction and rejects an activity and/or a document, and the FAA or TC who owns that transaction logs on, s/he will see a red link in the **Transaction Center** page indicating that there are transactions which require attention. The TC/FAA may also refine their transaction search using the **Approval Status** filter.



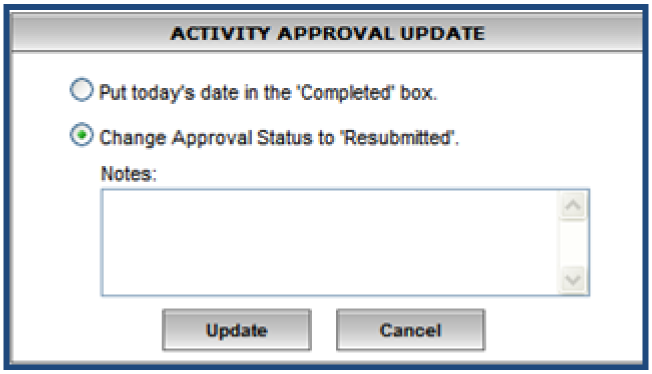
The TC/FAA can click on the link to display transactions that have items that need to be resubmitted. The message will display until the TC or FAA has corrected all of the items that were denied and the SSU/BX has approved those activities. A filter to search for transactions with items that have been approved, requested for resubmittal or resubmitted is available to refine your search.

When the TC/FAA selects a transaction, either from the 'needs attention' link or any transaction search, activities and documents that have been approved or denied are noted by changing the box on the Activities page from grey to green or red. The TC/FAA can see the reason their activity/document was rejected or approved by clicking on the activity or document log. See the **Activities** section of this guide for more information on viewing/managing the activity log.



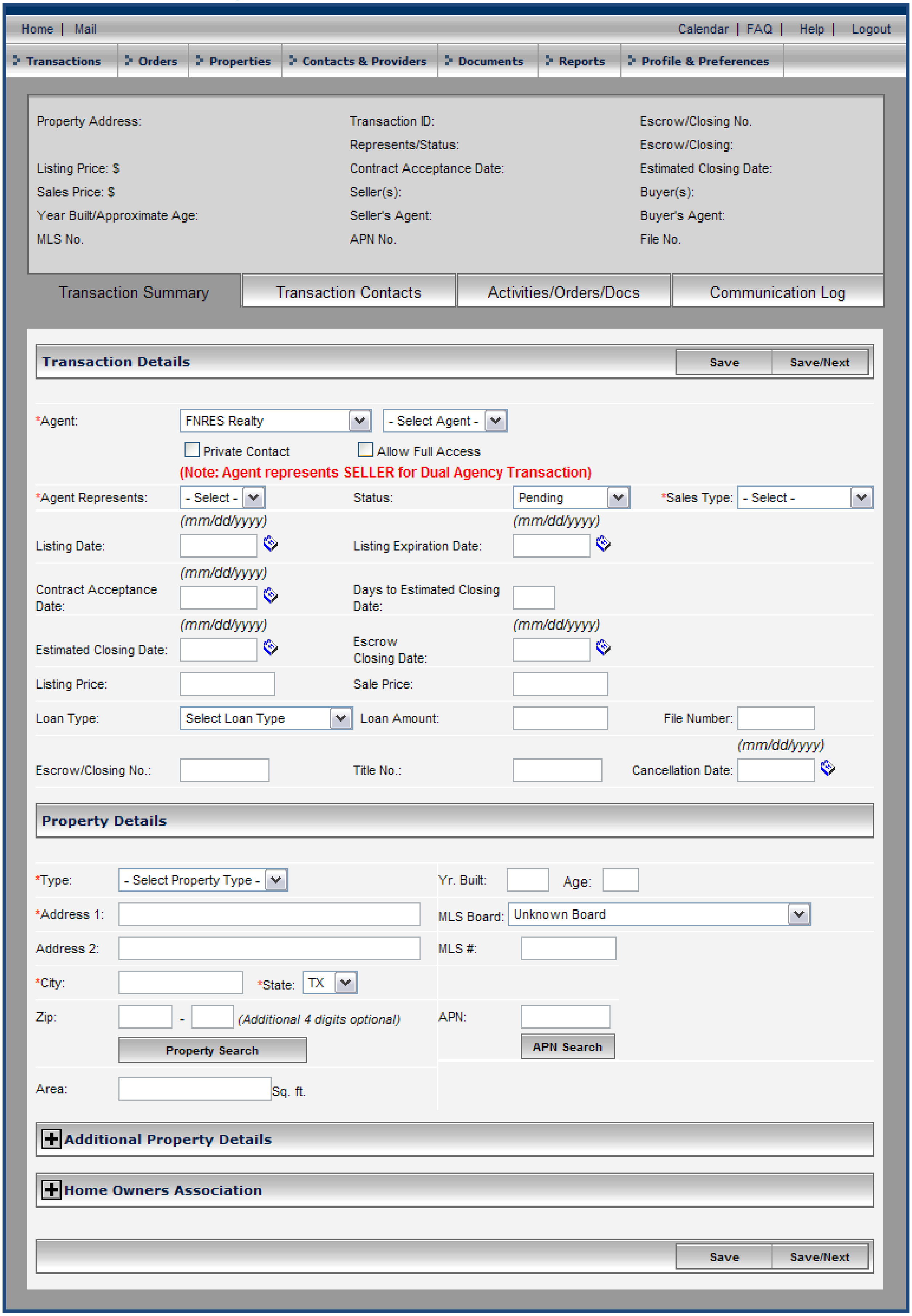
Note: The TC/FAA can click on the red box to add a note to the SSU/BX and change the status of the activity and/or document to 'Resubmitted.'

Note: If the TC/FAA selects a red box in the Activity list and the activity has been marked 'completed,' the Activity Approval window will open allowing the TC/FAA to make a comment regarding the activity and will give the TC/FAA the option of changing the approval status to 'Resubmitted.' That will cause the box to change color to yellow. If the activity has not been marked completed, the window that opens gives the TC/FAA the option to enter the current date in the completed box, or to make an Activity Approval note.



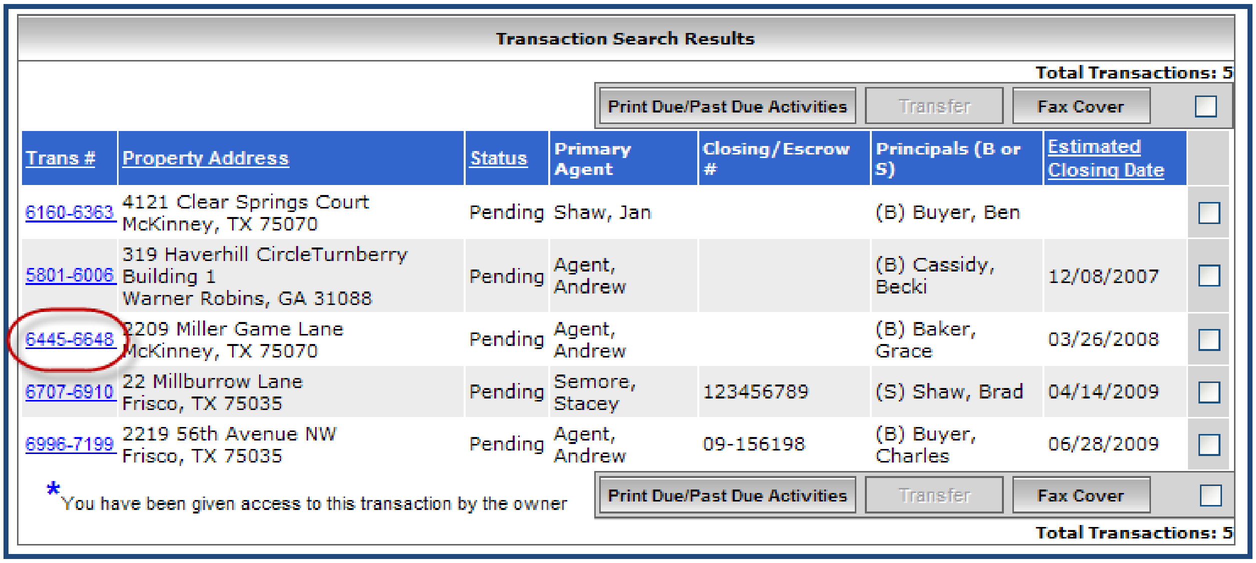
The line relating to the completion date will only appear if the activity is not completed.

Transaction Summary Tab Details



Updating Transaction Dates

You can update transactions specific dates on the **Transaction Summary** Page. To access the **Transaction Summary** page, click on the transaction ID to open the file from the **Transaction Center.**



Transaction Search Results

Total Transactions: 5

Print Due/Past Due Activities | Transfer | Fax Cover

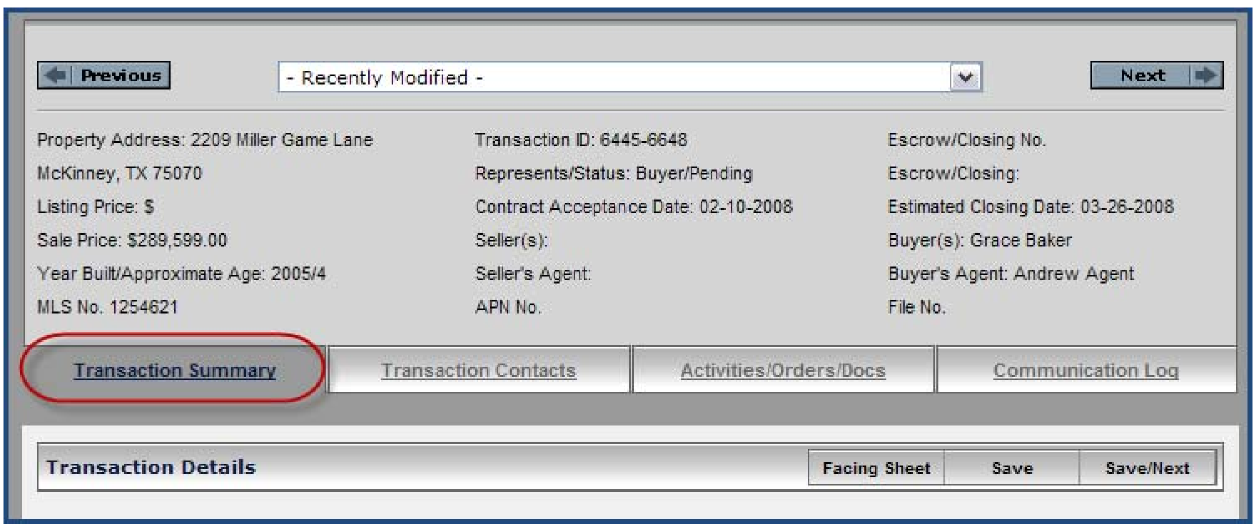
Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date
6160-6363	4121 Clear Springs Court McKinney, TX 75070	Pending	Shaw, Jan		(B) Buyer, Ben	
5801-6006	319 Haverhill CircleTurnberry Building 1 Warner Robins, GA 31088	Pending	Agent, Andrew		(B) Cassidy, Becki	12/08/2007
6445-6648	2209 Miller Game Lane McKinney, TX 75070	Pending	Agent, Andrew		(B) Baker, Grace	03/26/2008
6707-6910	22 Millburrow Lane Frisco, TX 75035	Pending	Semore, Stacey	123456789	(S) Shaw, Brad	04/14/2009
6996-7199	2219 56th Avenue NW Frisco, TX 75035	Pending	Agent, Andrew	09-156198	(B) Buyer, Charles	06/28/2009

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

Print Due/Past Due Activities | Transfer | Fax Cover

Total Transactions: 5

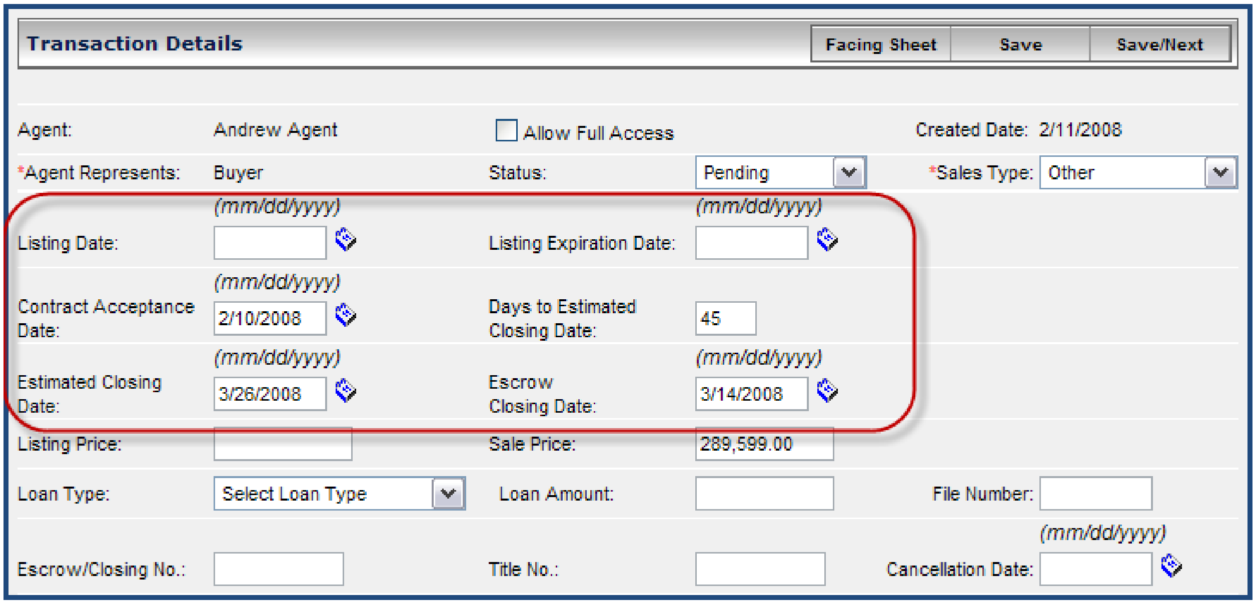
Click the tab marked **Transaction Summary.** This is located just below the **Property Dashboard**. The **Dashboard** summarizes property information, key dates and some important transaction details.



The **Transaction Summary** allows the TC/FAA to view or modify the following information:

- Transaction Details
- Property Details
- Additional Property Details
- HOA Information
- Facing Sheet

To modify transaction dates, make the appropriate date changes within the transaction details portion of the page and click **Save.**



Once you click **Save,** your **Key Dates** page will also be updated. By selecting **Save/Next**, you will be brought to the **Contacts** tab.

Note: You can make changes to transaction dates within the key dates page and any changes you make will automatically update the Transaction Details page.

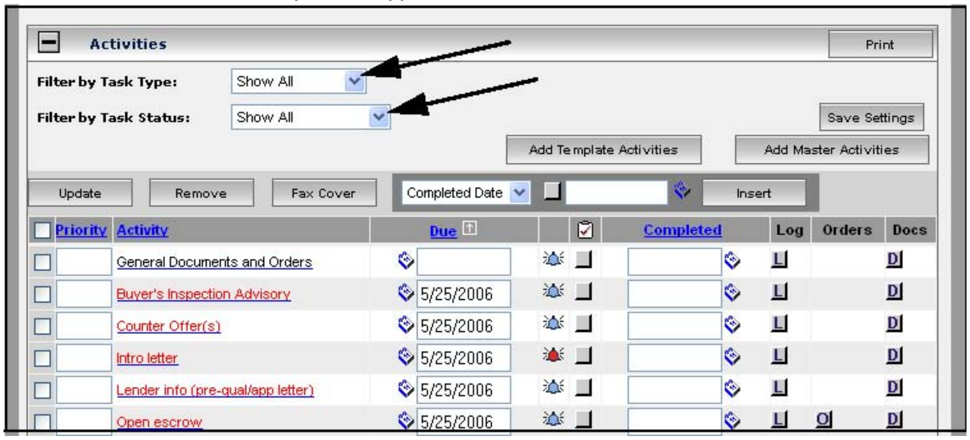
Working with Transaction Activities

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:

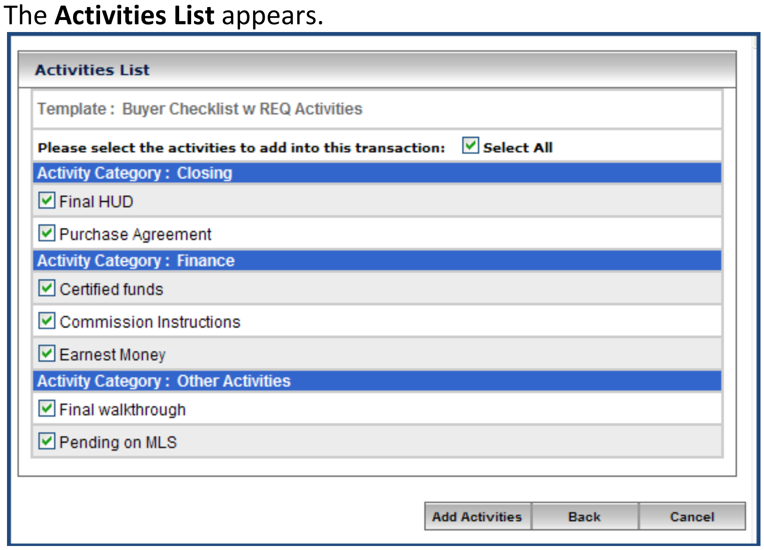


Click **Save Settings** to save the filter selection for future use.

Adding Template Activities

1. Click **Add Template Activities**.
2. Select the **Activity Template** you want to add to the file.
3. Click **Continue**.

The **Activities List** appears.



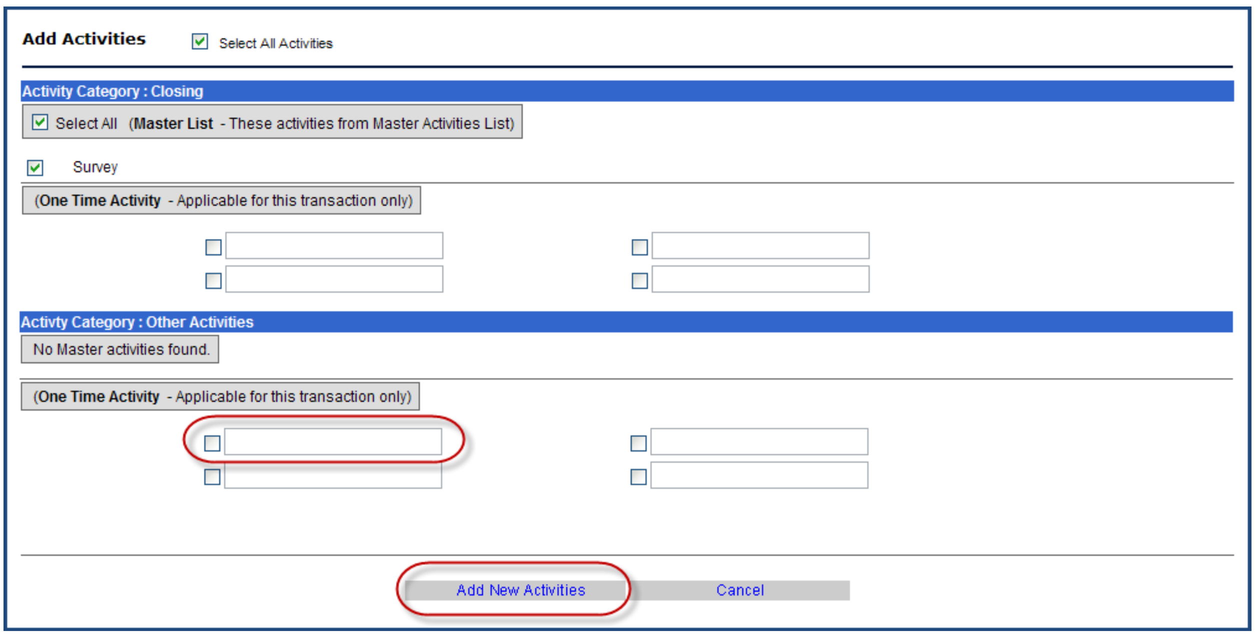
4. Uncheck any activities you may not want to add to the file, Click **Add Activities**. The **Activities/Orders/Docs** page will be updated with your newly added activities.

Adding Master Activities

1. Click **Add Master Activities**.
2. Uncheck any activities you may not want to add to the file, Click **Add Activities**.
3. Click **Add New Activities**. The **Activities/Orders/Docs** page will be updated with your newly added activities

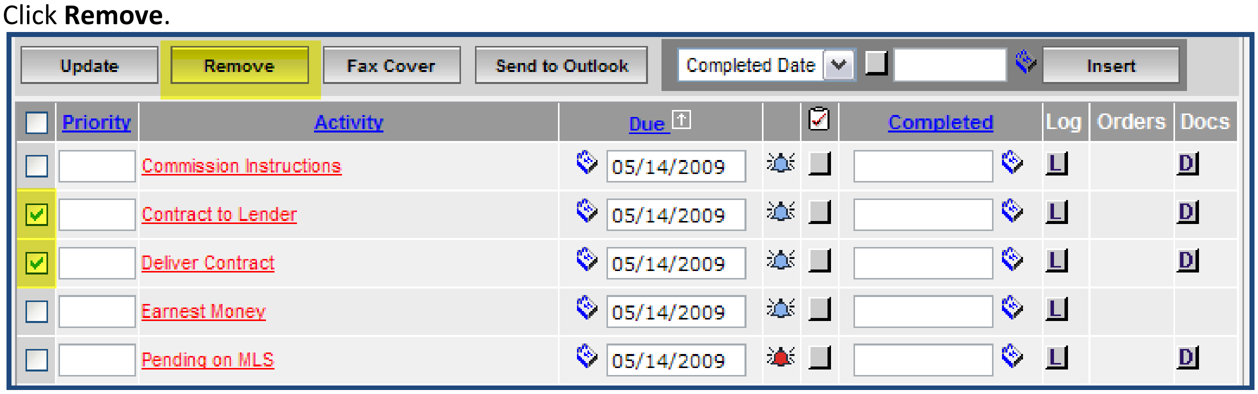
Adding One-time Activities

1. Click **Add Master Activities**.
2. Uncheck any activities you may not want to add to the file. Enter the activities you want to add in the appropriate activity category section.
   Note: Categories can be customized by the Site Administrator.
3. Click **Add New Activities**.
4. Uncheck any activities you do not wish to add.
5. Place a check to add a onetime activity under the respective category. Type in a description of the activity and click **Add New Activities.**



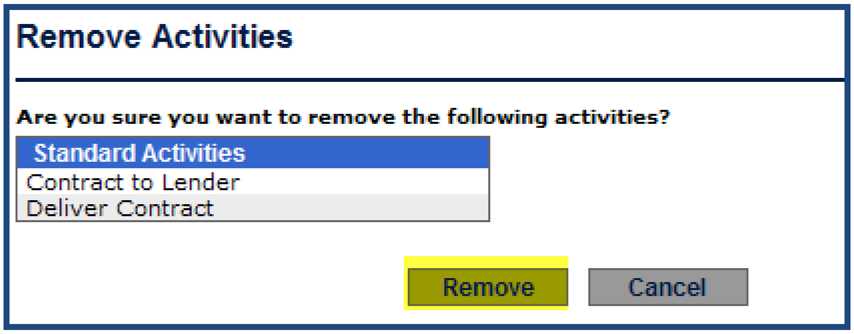
Removing Activities

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



3. You will receive a pop-up window asking you to confirm you want to remove the selected items.

Click **Remove.**

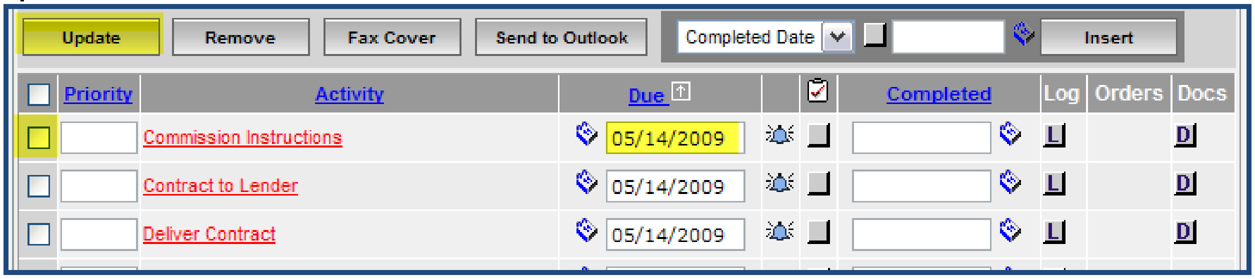


Note: Up to 50 activities can be removed at one time.

Updating Due Dates

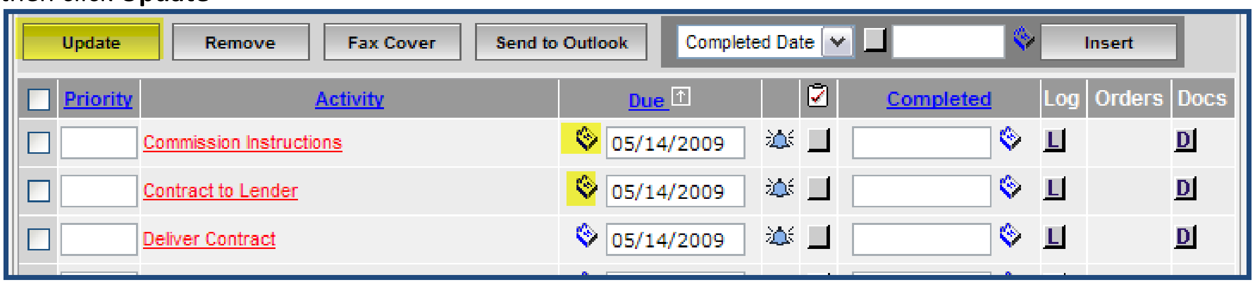
You have several options for updating **Due Dates** for your activities

1. Select the **Activity** you want to edit the due date for, enter the date in the **Due** field, then click **Update**:

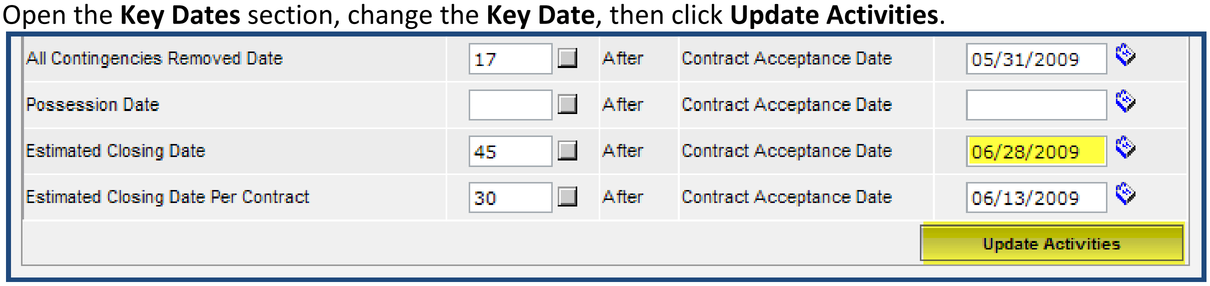


Note: You can select multiple activities to update at once.

2. Select the **Activity** you want to edit the due date for, click the **Calendar Icon**, select the date, then click **Update**

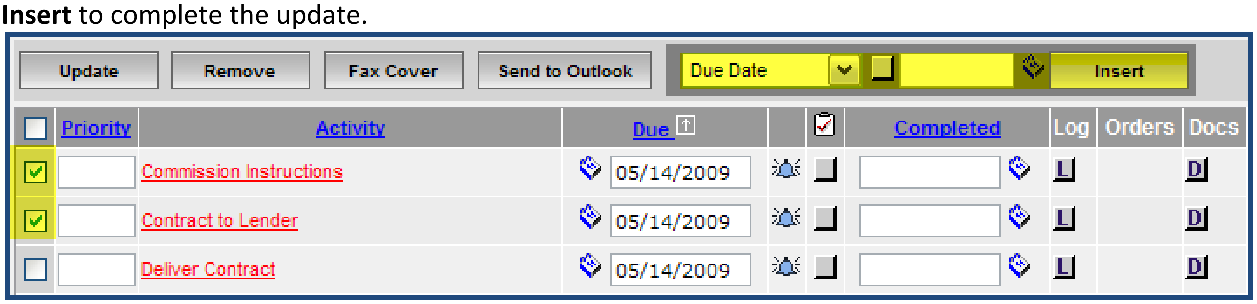


3. Open the **Key Dates** section, change the **Key Date**, then click **Update Activities**.



Note: All activities that are not marked complete will be updated with a new **Due Date** including dates you have entered manually.

4. You can insert a new due date for multiple activities at once by selecting the **Activities** first then choosing the grey box, input the date manually or choose the calendar and select a date. Click **Insert** to complete the update.

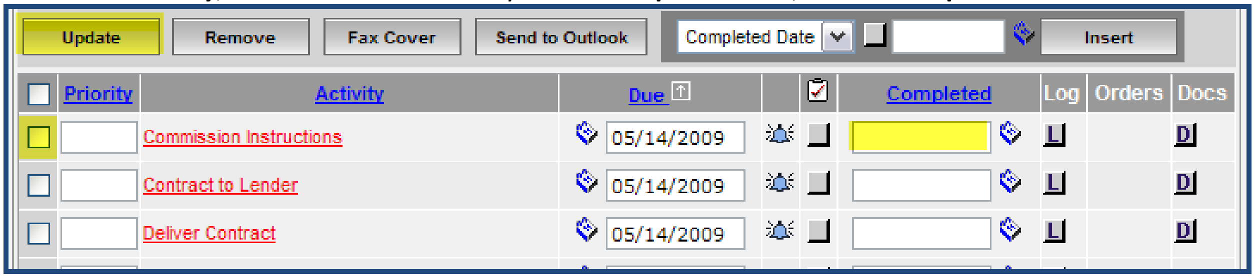


Note: Choosing **Insert** will save your changes just as clicking **Update** will.

Entering Completion Dates

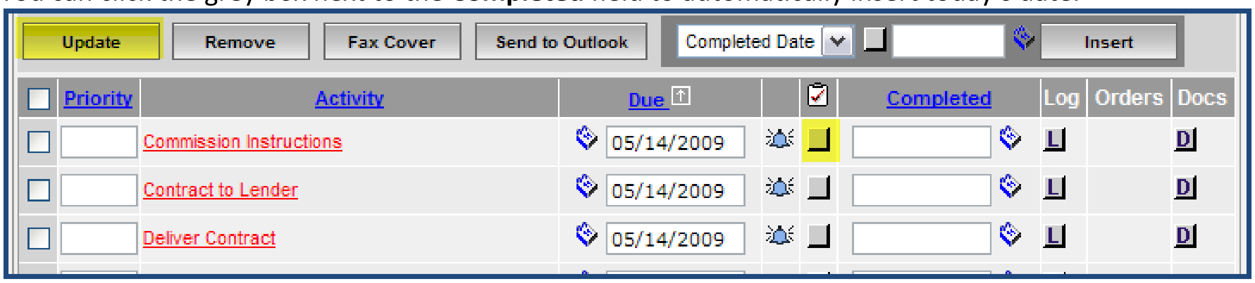
You have several options for marking your **Activities** complete.

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

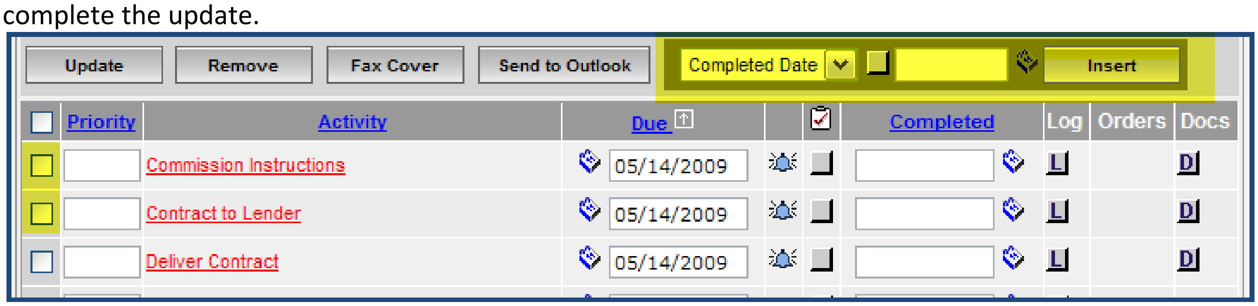


You can select multiple activities to update at once.

2. You can click the grey box next to the **Completed** field to automatically insert today's date.



3. You can mark multiple items complete all at once by selecting the **Activities** first then choosing the grey box, input the date manually or choose the calendar and select a date. Click **Insert** to complete the update.



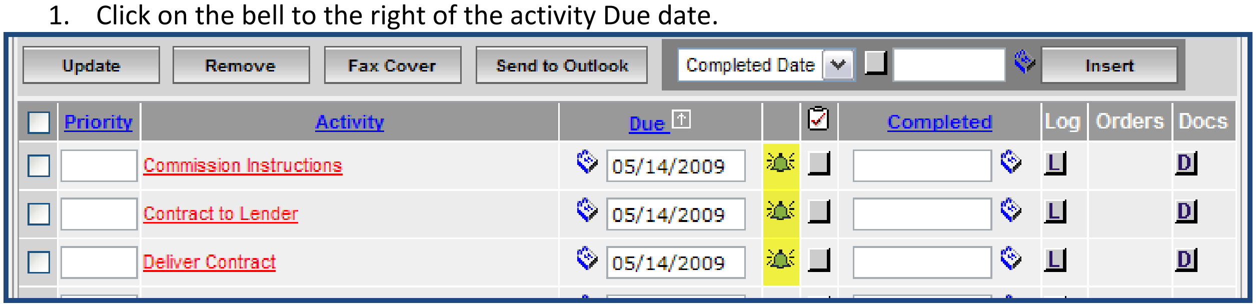
Note: Choosing **Insert** will save your changes just as clicking **Update** will.

Setting Alerts

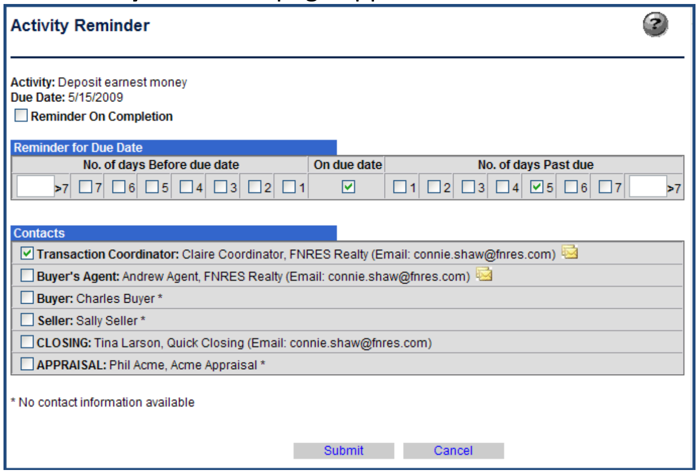
Activity reminder allows users to configure notification for each activity with the ability to select transaction contacts to receive the notifications.

To send out notification:

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



The **Activity Reminder** page appears.



2. Choose the days the notifications should be sent out, you can choose multiple days.
    a. You can choose from 1 or more day(s) before, on due date and 1 or more day(s) past due.
    b. If number of days is past 7 days, you can also choose to simple type the number of days before or after due date.
3. To send notifications once complete, click on the checkbox beside **Reminder on Completion**
4. Choose 1 or more recipients of the activity reminder from the contact list
    a. Depending on the contacts primary notification type, reminder will be sent via email or fax.
5. Click **Submit** to save the alert/notification

Note: Email notifications will be sent out once a day at midnight. If a contact has more than 1 notification set for the same day, all notifications will be bundled into a single email. Also, if activity/task has been completed before the notification date, no more reminder/notifications will be sent out except for **Reminder on Completion.** All alerts wills top when an activity is marked complete or a transaction status is changed to cancelled or void.

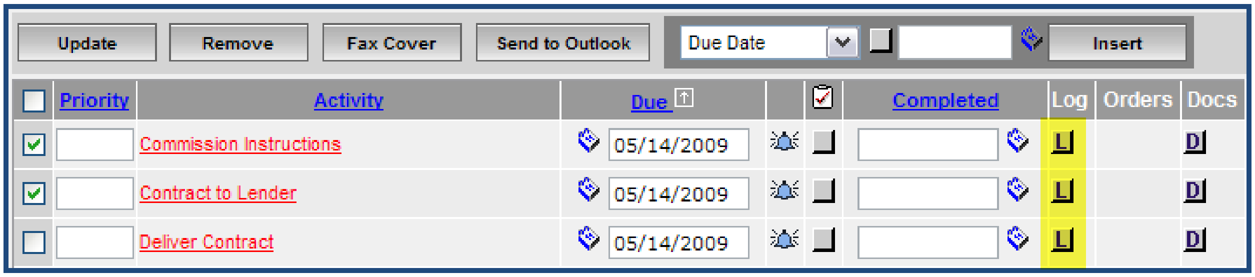
Note: The Site Administrator can set default email reminders for you, the buyer, seller, closer, listing agent or sales agent. All new transactions then have reminders set for the specified activities. When a transaction is created and activities are populated into the transaction, you see red bells for reminders that are set and blue bells for reminders that are not set.

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 and the closing provider should the activity be marked as Public. Logs are also viewable by the primary agent and the super user/branch executive. Activity security is set by the Site Admin.

To access the Activity Log:

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

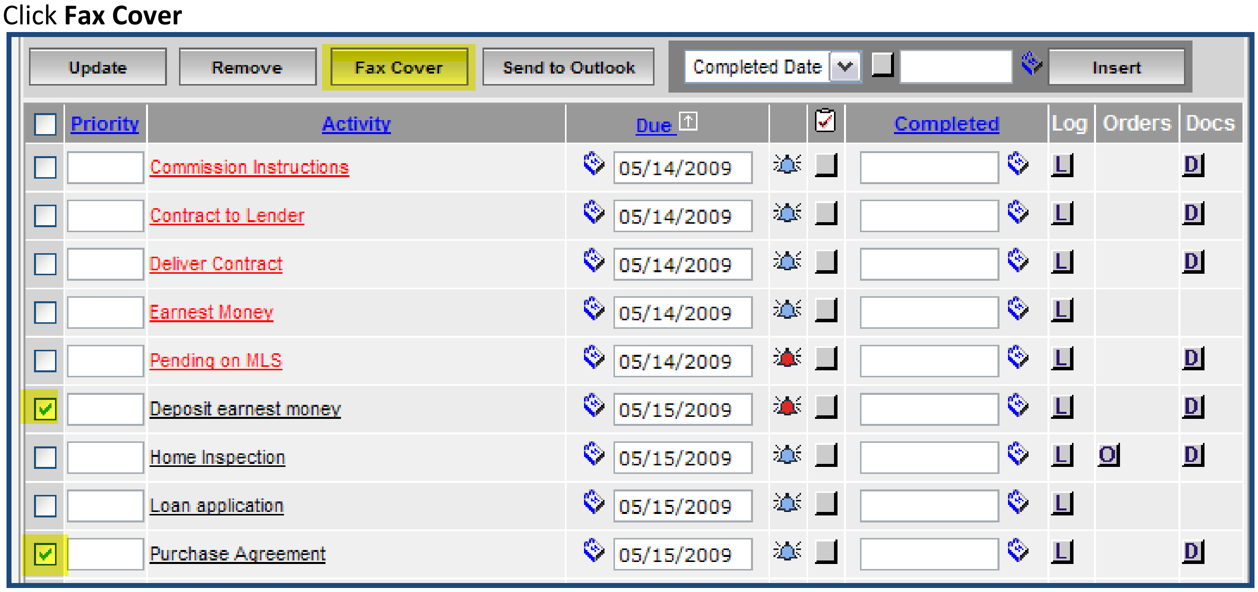


2. Enter your comment.
3. Click **Submit**.

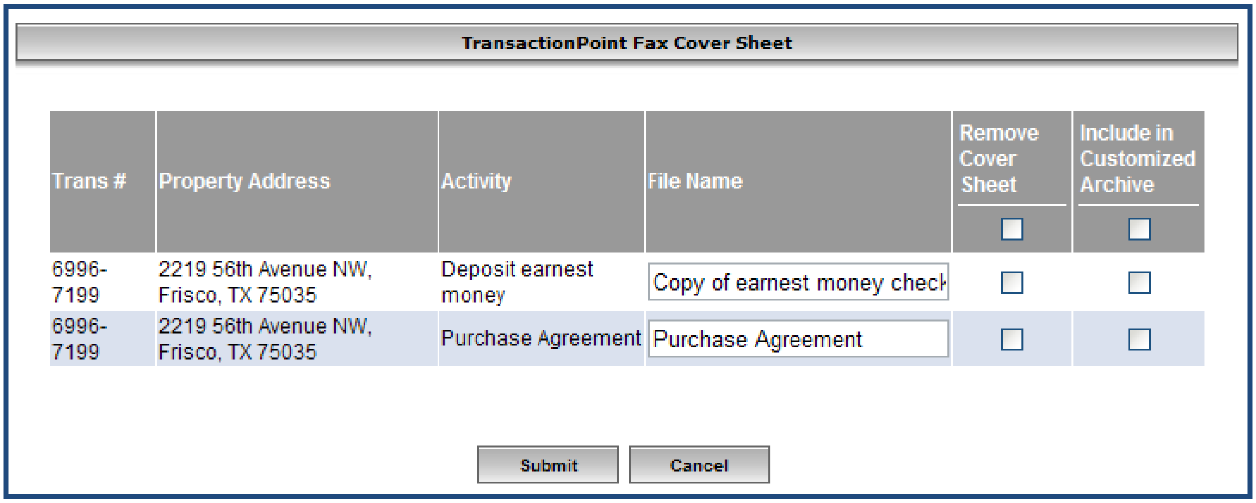
Printing Activity Fax Cover Sheets

To fax Documents to an Activity using a Fax Cover Sheet complete the following:

1. Select the activity you want to print a Fax cover sheet for.
2. Click **Fax Cover**



The **Fax Cover Sheet** preparation window appears.



TransactionPoint Fax Cover Sheet

Trans #	Property Address	Activity	File Name	Remove Cover Sheet	Include in Customized Archive
6996-7199	2219 56th Avenue NW, Frisco, TX 75035	Deposit earnest money	Copy of earnest money check	☐	☐
6996-7199	2219 56th Avenue NW, Frisco, TX 75035	Purchase Agreement	Purchase Agreement	☐	☐

Submit Cancel

Note: You can choose to have the system delete the fax cover sheet when the fax is posted to TransactionPoint. Simply check the box.

Note: You can choose to include the faxed document in a **Customized Archive**. For more information on archiving, please review the **Archiving** section of this guide.

3. Click **Submit**.

The **Fax Cover Sheet** appears.

Fax Cover Sheet

TransactionPoint

Claire Coordinator
FNRES Realty
Fax To: (866)[illegible]
Please place this cover sheet on top of document.

Date: ____________________ # of Pages: __________

2724

Process Id: 4175993

2724

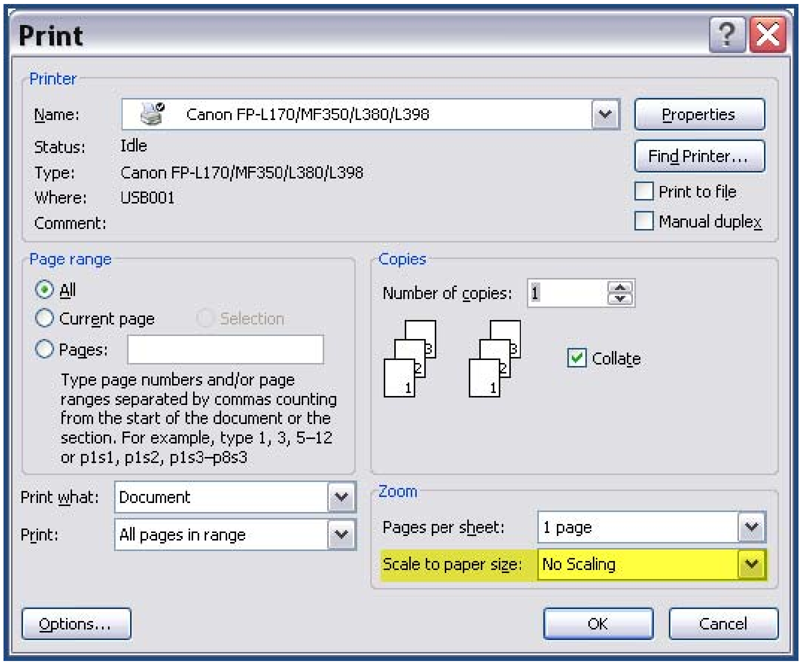
Notes:

File Name: Copy of earnest money check
Transaction Number: 7199
Site ID: 126-P1
Property Address: 2219 56th Avenue NW, Frisco, TX 75035
User ID: 14439
Document Type: Activity (26340): Deposit earnest money
Remove Cover Sheet? No

4. Print the fax coversheet(s).
5. Insert the coversheet in front of the document and fax documents to the toll free number indicated on the coversheet.

Tips:

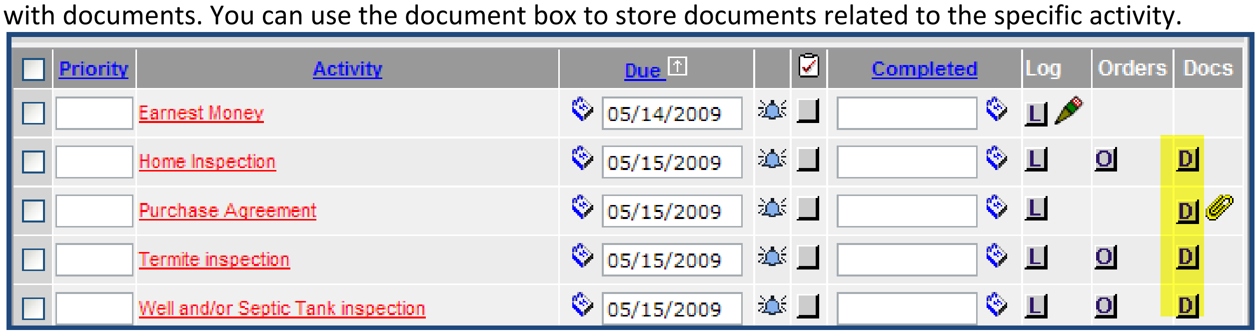
1. Multiple documents can be batched together in a single fax transmission, separated by coversheets.
2. When printing your fax coversheets, disable **Scale to paper size** settings.



3. You may wish to email the fax coversheets to another party to use.
4. You may wish to save these fax coversheets to your computer and print them out as needed.
5. You may select multiple **Activities** and print out their respective fax coversheets all at once.

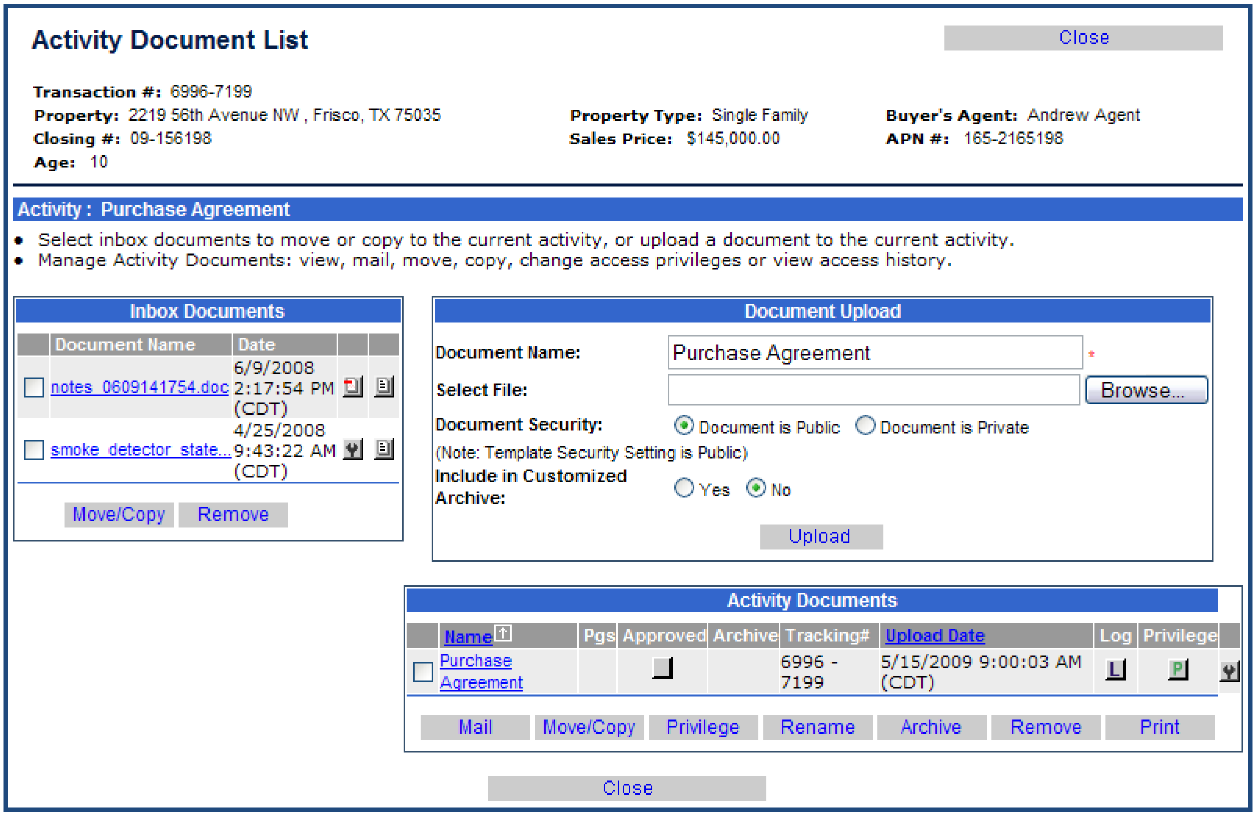
Uploading a Document to an Activity

The letter **D** appears under the **Docs** 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.

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.

Working with Activity Documents

TransactionPoint offers several methods for working with documents that can be found in several locations throughout the application itself. Some of the options for working with documents include but are not limited to:

1. Emailing Documents
2. Moving or Copying documents to another file
3. Manage document access
4. Choosing to include a document in a custom archive
5. Removing a documents
6. Printing documents
7. Viewing a document history Log

Emailing Documents from TransactionPoint

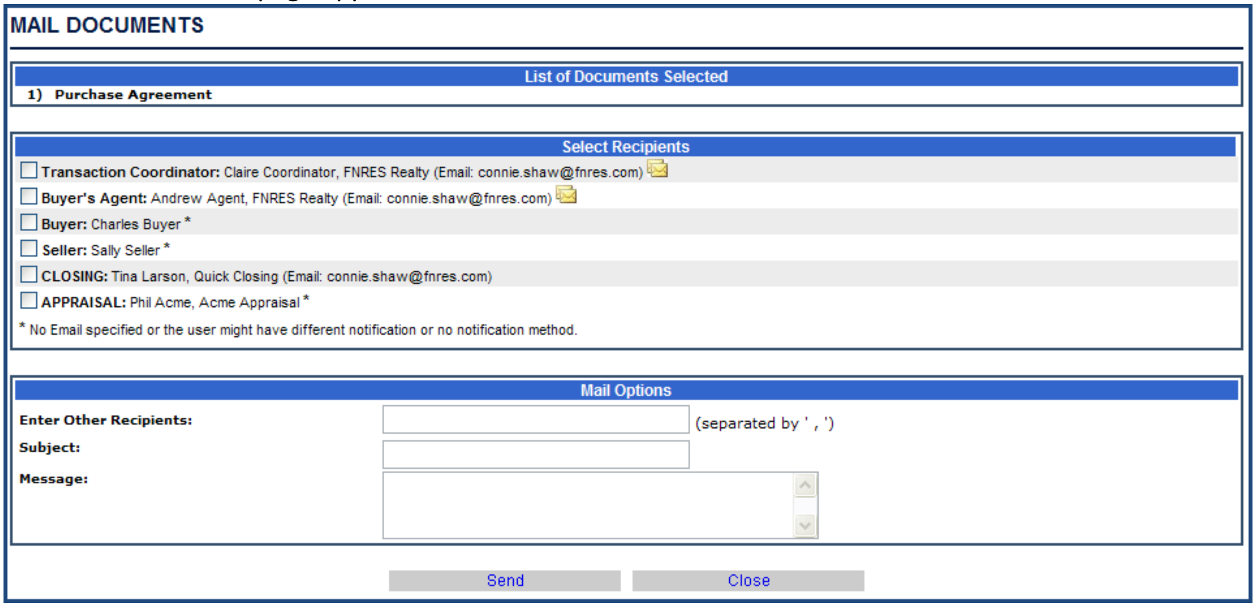
There are 3 primary locations for emailing documents.

1. Directly from the activity document you access by clicking on the paperclip
2. You can email documents from the **Documents** section of the **Activities/Orders/Docs** page.
3. You can email documents from the **Documents** section that is accessed from the main navigational toolbar.

To email the document to another party…

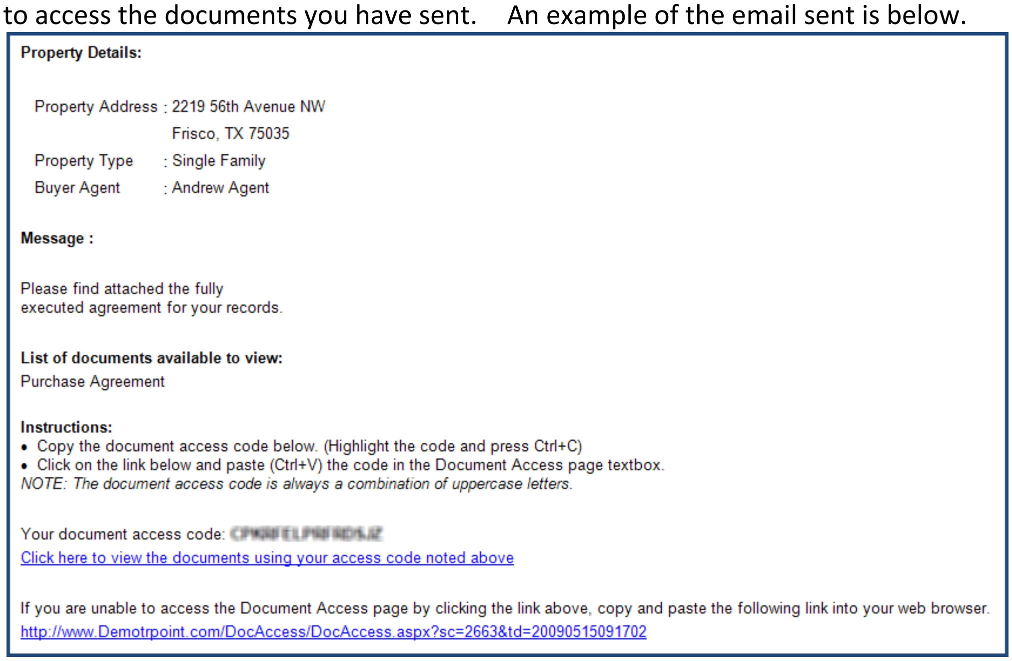
1. Select the document or documents you wish to send
2. Click **Mail**.

The **Mail Documents** page appears.



3. Select the **Recipients** you want to send the document to
   (*Tip: you can only send documents via email to those contacts where you have an email address noted.)*
4. Enter email addresses for additional parties in the **Other Recipients** area, separated by a comma.
5. Enter a **Subject** line for the email.
   (*Tip: to avoid emails being flagged as spam you are encouraged to enter a subject line.)*
6. Enter a **Message**.
7. Click **Send**.

TransactionPoint will send an email message to the parties you have selected with instructions on how to access the documents you have sent. An example of the email sent is below.



Property Details:

Property Address : 2219 56th Avenue NW
Frisco, TX 75035
Property Type : Single Family
Buyer Agent : Andrew Agent

Message :

Please find attached the fully
executed agreement for your records.

List of documents available to view:
Purchase Agreement

Instructions:
- Copy the document access code below. (Highlight the code and press Ctrl+C)
- Click on the link below and paste (Ctrl+V) the code in the Document Access page textbox.

NOTE: The document access code is always a combination of uppercase letters.

Your document access code:
Click here to view the documents using your access code noted above

If you are unable to access the Document Access page by clicking the link above, copy and paste the following link into your web browser.
http://www.Demotrpoint.com/DocAccess/DocAccess.aspx?sc=2663&td=20090515091702

Emailing Documents to TransactionPoint

Any documents sent to TransactionPoint with a **Profile Generated Fax Coversheet** or documents that were emailed to TransactionPoint with the format userid@doc.trpoint.com will fall under **Inbox Documents**.

Note: Sites may use an alternative domain for sending emails. Please check with your Site Admin for your specific domain. (Domain= ______[**@doc.trpoint.com**]).

> The document is uploaded with the access privilege of the transaction coordinator or agent (if the *username)* is specified. The document will be marked either **public** or **private** based on what the transaction coordinator or agent had selected for access privileges under their profile. The default access privilege can be modified by the Transaction Coordinator or Agent within their Profile/Preferences page.

When emailing documents to TransactionPoint, select the best method that works for you.

Documents may be emailed directly to the transaction by using the format *transactionid*@doc.trpoint.com. Documents that are emailed to the transaction ID will be displayed next to the transactions activity titled **General Docs and Orders.**

Note: Sites may use an alternative domain for sending emails. Please check with your Site Admin for your specific domain. (Domain= ______[**@doc.trpoint.com**]).

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

Note: Documents may be emailed directly to an order within the transaction as well by using the format *orderid#*@doc.trpoint.com.

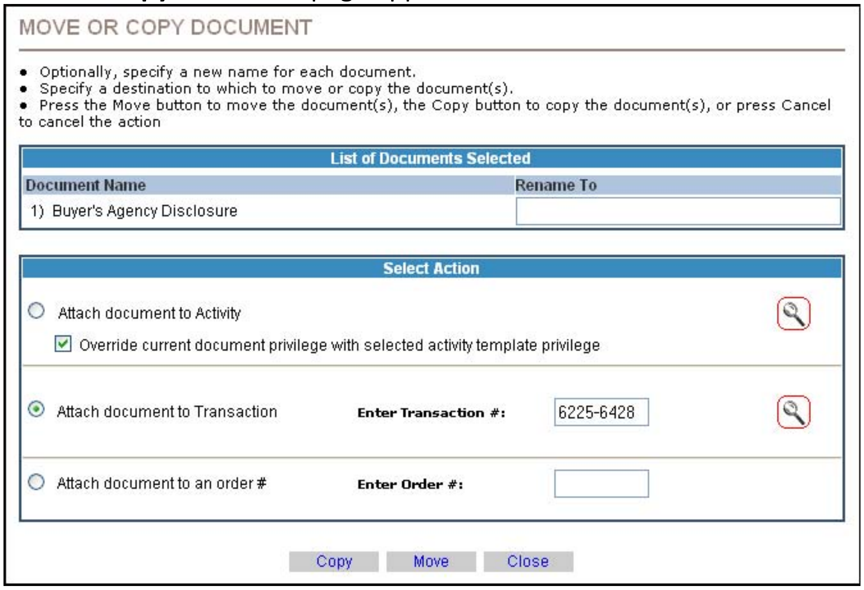
Note: Sites may use an alternative domain for sending emails. Please check with your Site Admin for your specific domain. (Domain= ______[**@doc.trpoint.com**]).

Moving or Copying Documents

There may be instances where a document was misplaced or you wish to have a document copied to another file.

1. Select the document or documents you wish to **Move** or **Copy**
2. Click **Move/Copy**

Move or Copy Document page appears.



3. Specify a destination to which you want to move or copy the document(s)
4. Click the **Move** button to move the document(s), the **Copy** button to copy the document(s) or press **Close** to Cancel the action.

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.

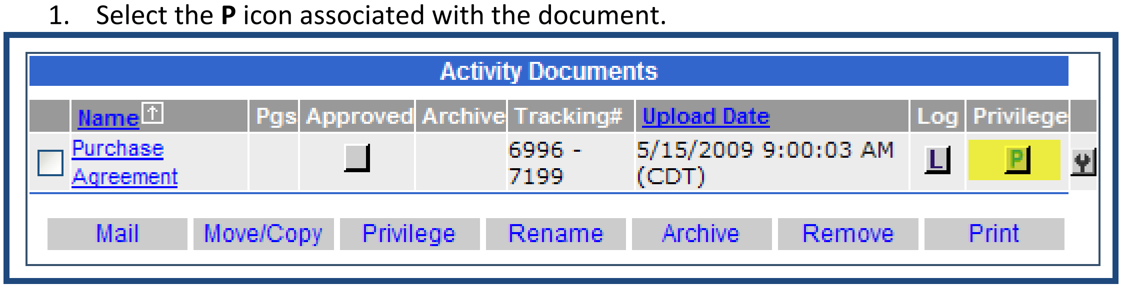
Note: You may use the search icon to search for a specific **Activity** or **Transaction** to associate the document with.

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.

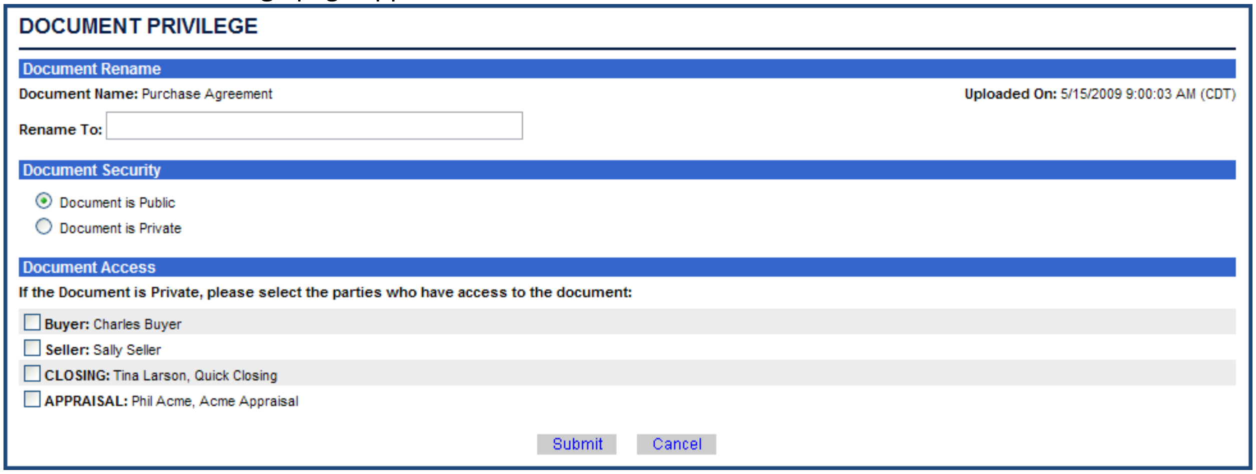
Manage Document Access

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.

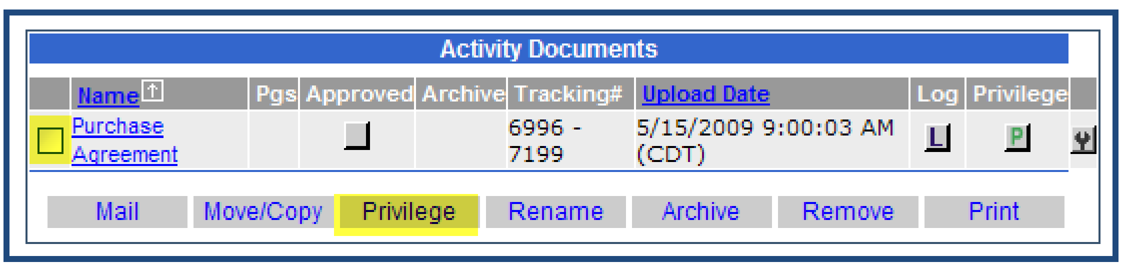


2. Rename the document, if necessary.
3. Select the **Document is Public** option to allow anyone to view the document; select **Document is Private** to limit the access to specific Buyers, Sellers, transaction participants, and/or Other Agents.
4. Select the check boxes of the individuals listed in the **Document Access** section for those you would like to grant document access to.
5. Click **Submit** to save your changes or click **Cancel** to cancel the action

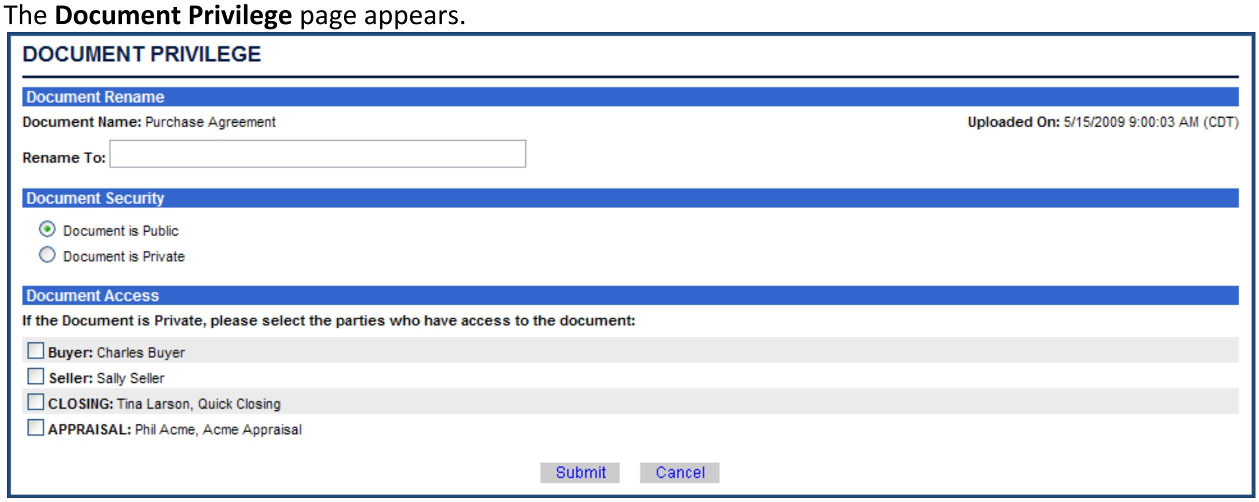
Note: Public documents may be viewed from the login page. In order for anyone to view the public documents, they must be provided the Transaction ID.

You may change document privileges for multiple documents at once.

1. Select the check box of the document (s) you wish to change access privileges for
2. Click **Privilege**



The **Document Privilege** page appears.



3. Rename the document, if necessary.

4. 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.
5. Select the check boxes of the individuals listed in the **Document Access** section for those you would like to grant document access to.
6. Click **Submit** to save your changes or click **Cancel** to cancel the action

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:

1. **Public** access makes the document viewable to all parties named in the transaction.
2. **Private** access makes the document viewable only to the Primary Agent, Transaction Coordinator, Super User and any other parties specified at the Admin level.

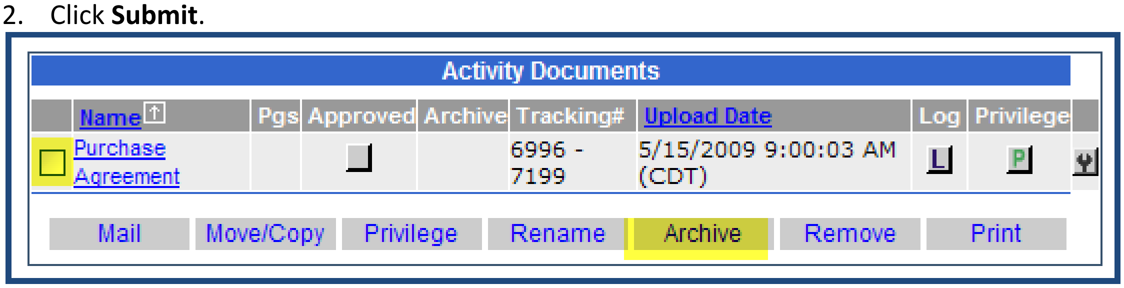
The Site Administrator may set the document privilege to **Private** and give viewing access to the following user types:

1. Buyer
2. Seller
3. Buyer's Agent
4. Seller's Agent
5. Escrow/Closing

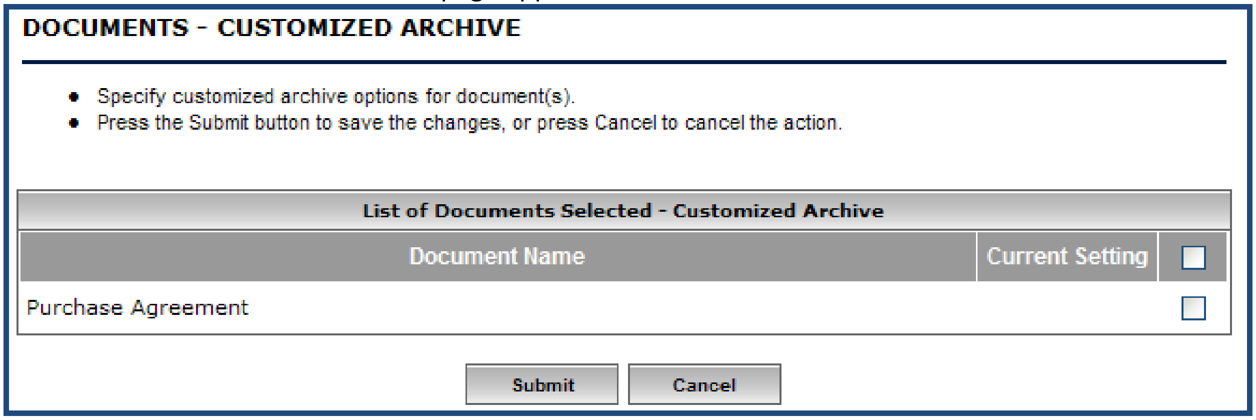
Document Custom Archive

The following information outlines how to include documents in a **Custom** archive. See the **Archiving** portion of this guide for specific details on archiving files.

1. Select the check box of the document to be included in a custom archived and click **Archive**.
2. Click **Submit**.



The **Documents – Customer Archive** page appears

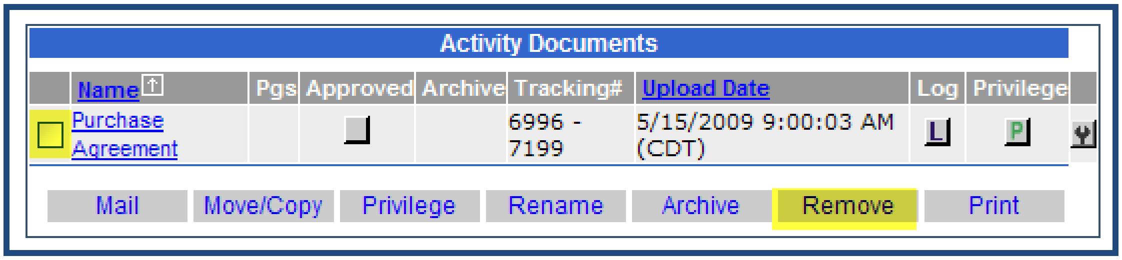


3. Select the checkbox if you wish to have this document included in a **Custom** archive
4. Click **Submit**

Removing Documents

You can remove documents from the **Inbox Documents** list, **Activity Document List** or the **Transaction Documents** list.

1. Select the check box of the document you want to remove
2. Click **Remove**.

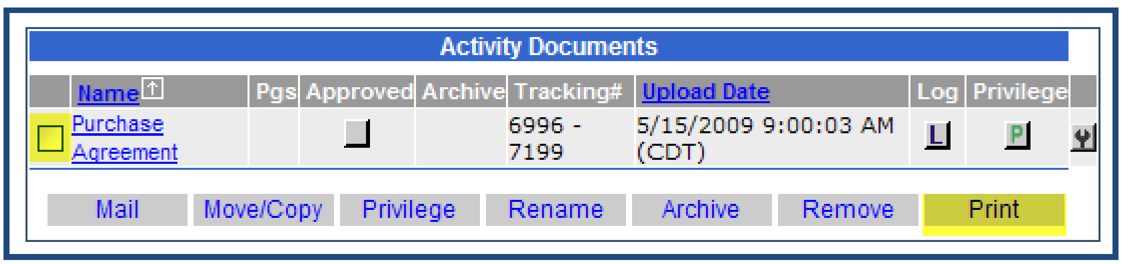


Note: The Site Admin may inactivate the Remove Document function. If you receive an error message restricting you from removing a document, please contact your Site Admin for assistance.

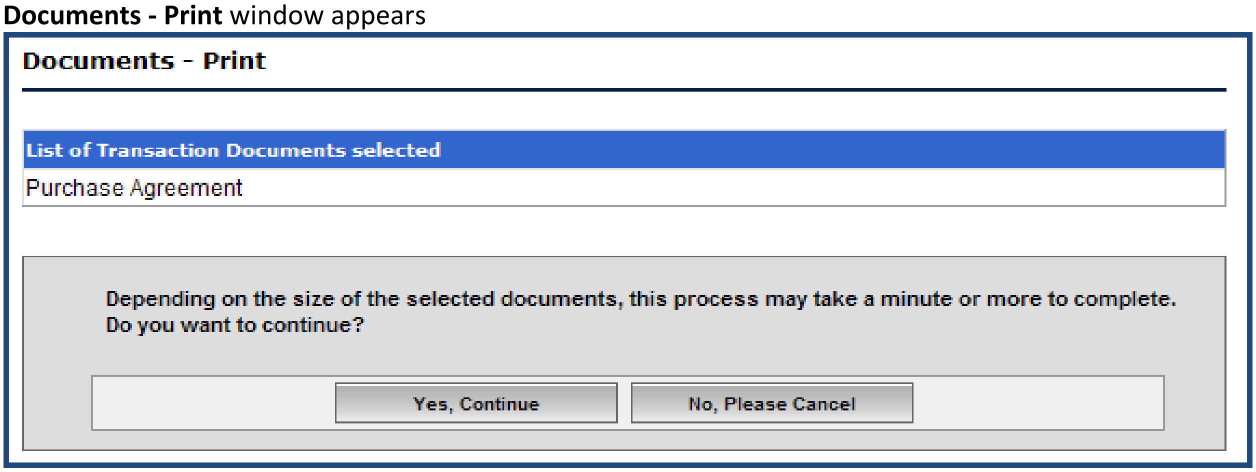
Printing Documents

You can print documents from the **Activity Document List** or the **Transaction Documents** list.

1. Select the check box of the document you want to print
2. Click **Print**



The **Documents - Print** window appears



3. Click **Yes, Continue** to prepare a document package you can print
4. Print the documents by selecting **File**>**Print**.
5. Save the documents (as a single document) by selecting **File**>**Save**.

Note: You can choose to print multiple documents at once. Each document package prepared includes a document package coversheet. You can choose to print or save the document package through your browser settings.

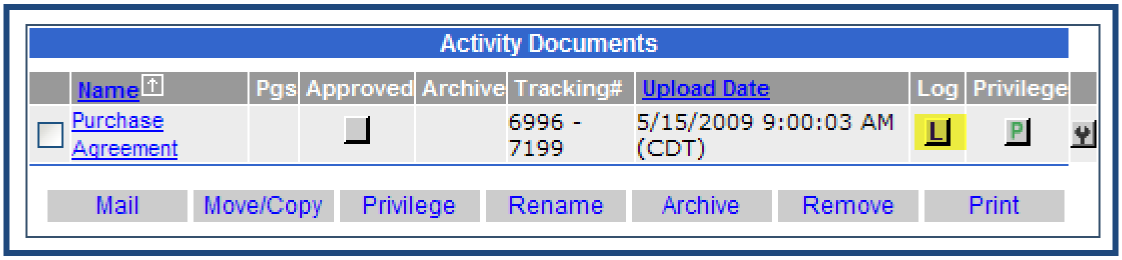
Document Log

Each document tracks:

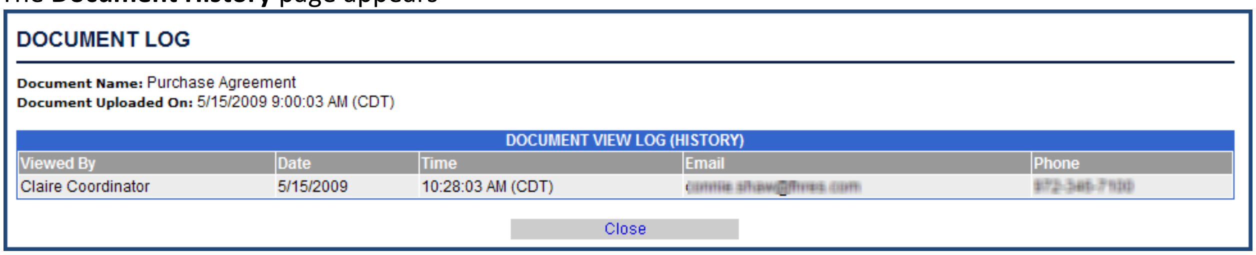
1. Who has accessed the document
2. When the document was uploaded.
3. Who has viewed the document and the date and time of the viewing
4. The e-mail address of the individual who viewed the document.

To access the Document Log:

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



The **Document History** page appears



Note: Documents that are emailed from TransactionPoint retain the email history within the **Comm Log**. See the **Comm Log** section of this guide for more details.

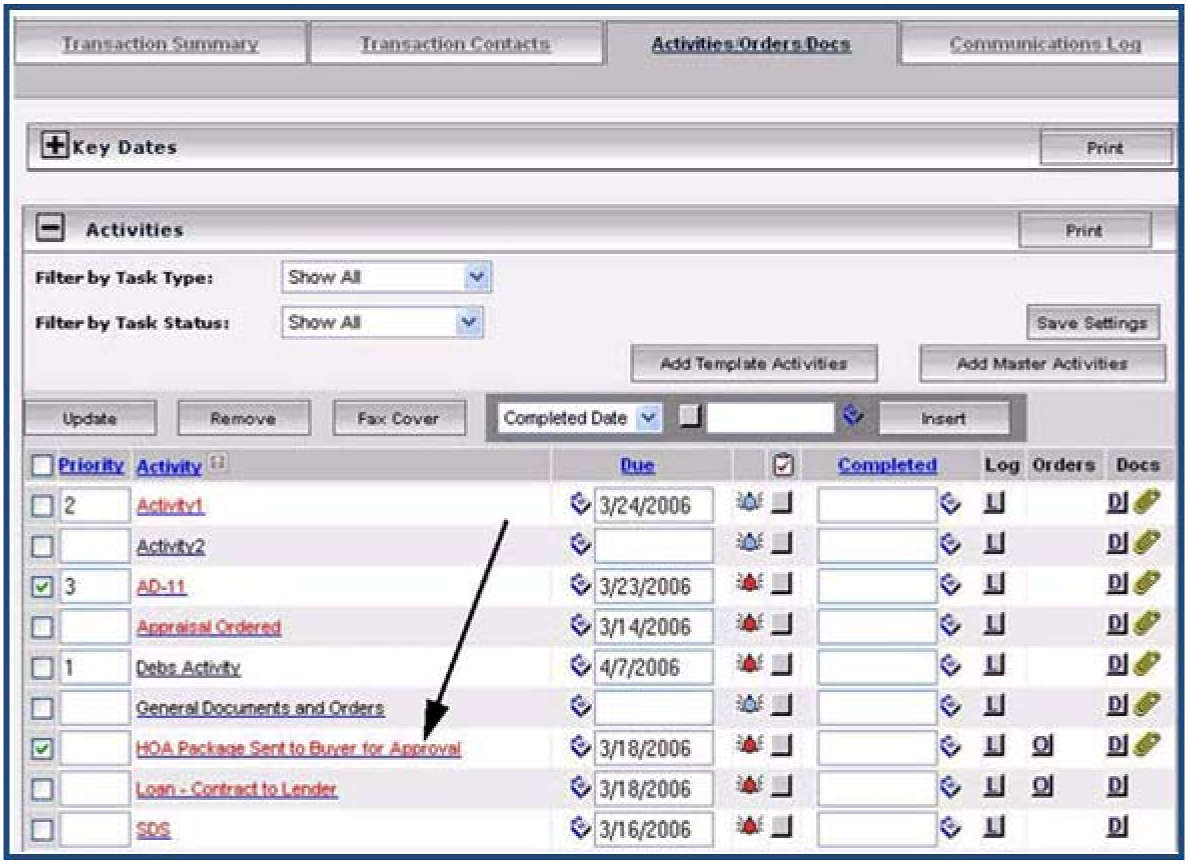
Viewing Default Activities Privileges and Archive Settings

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

1. Public makes the activity viewable to all parties named in the transaction who have permission to see activities.
2. Private makes the activity viewable only to the Primary Agent, Transaction Coordinator, and Super User.

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

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



Transaction Summary
Transaction Contacts
Activities/Orders/Docs
Communications Log
Key Dates
Print
Activities
Print
Filter by Task Type:
Show All
Filter by Task Status:
Show All
Save Settings
Add Template Activities
Add Master Activities
Update
Remove
Fax Cover
Completed Date
Insert
Priority
Activity
Due
Completed
Log
Orders
Docs
2
Activity1
3/24/2006
Activity2
3
AD-11
3/23/2006
Appraisal Ordered
3/14/2006
1
Debs Activity
4/7/2006
General Documents and Orders
HOA Package Sent to Buyer for Approval
3/18/2006
Loan - Contract to Lender
3/18/2006
SDS
3/16/2006

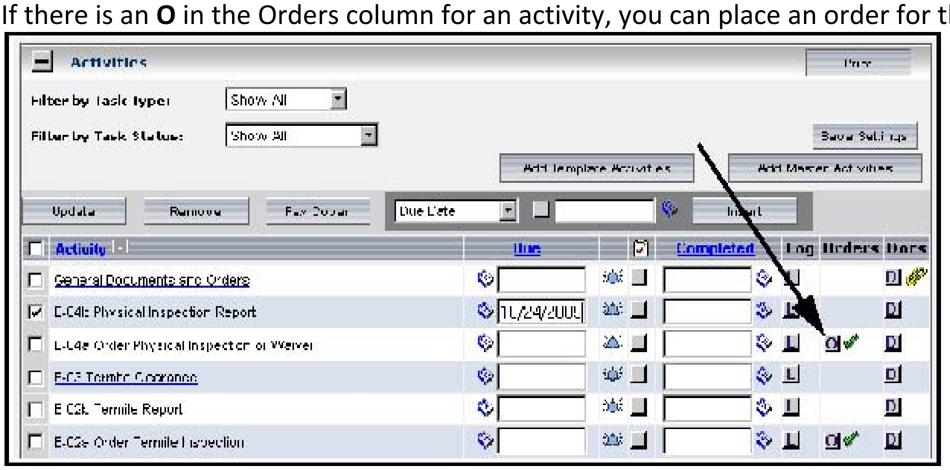
A pop-up window appears showing the privilege (detailed business rules for the activity)

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.

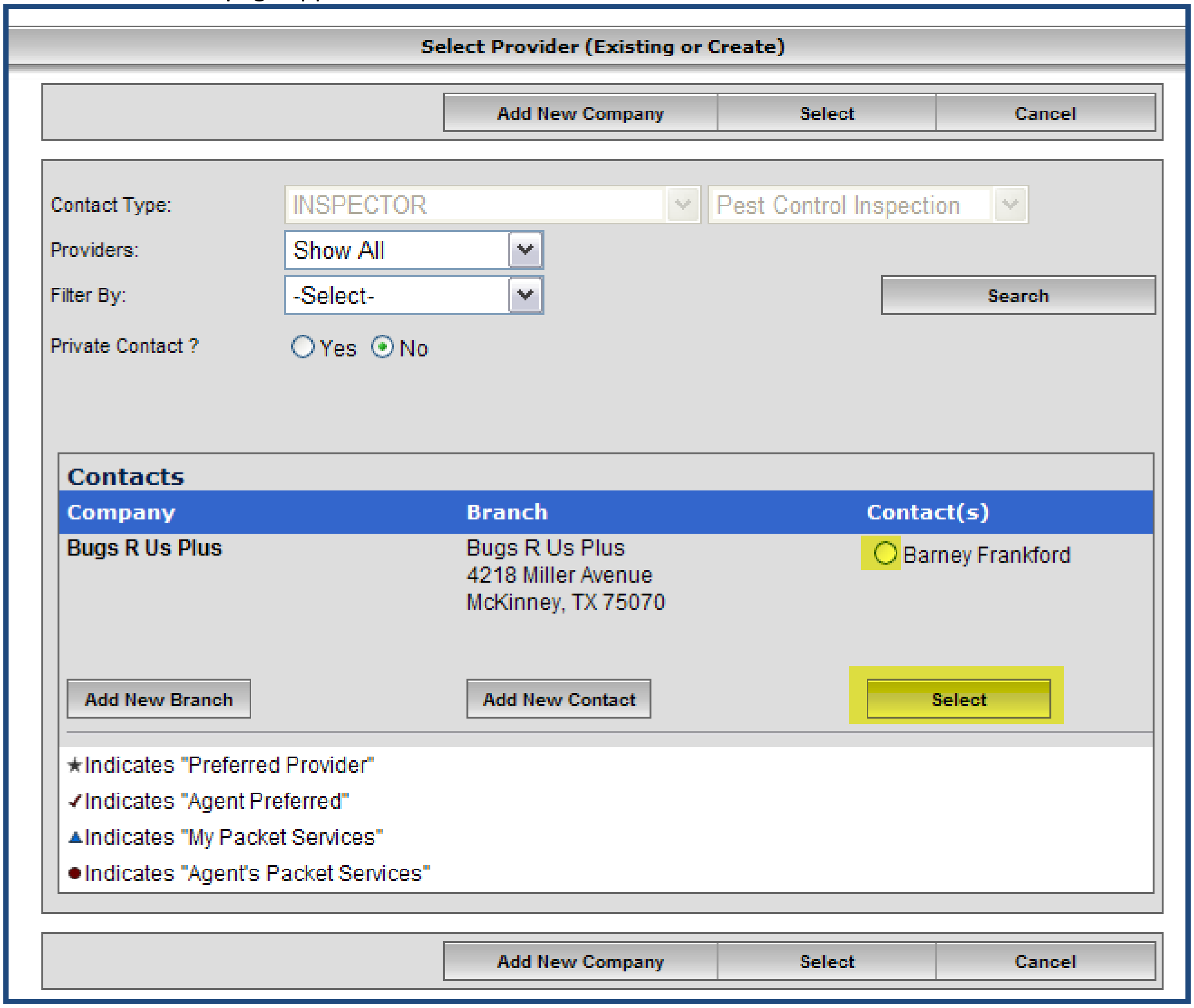
Placing Activity Orders

The Site Administrator can set activities that allow you to place an order directly from the Activity List. If there is an **O** in the Orders column for an activity, you can place an order for that activity.



1. Click **O** to place the **Order**

The Select Provider page appears.

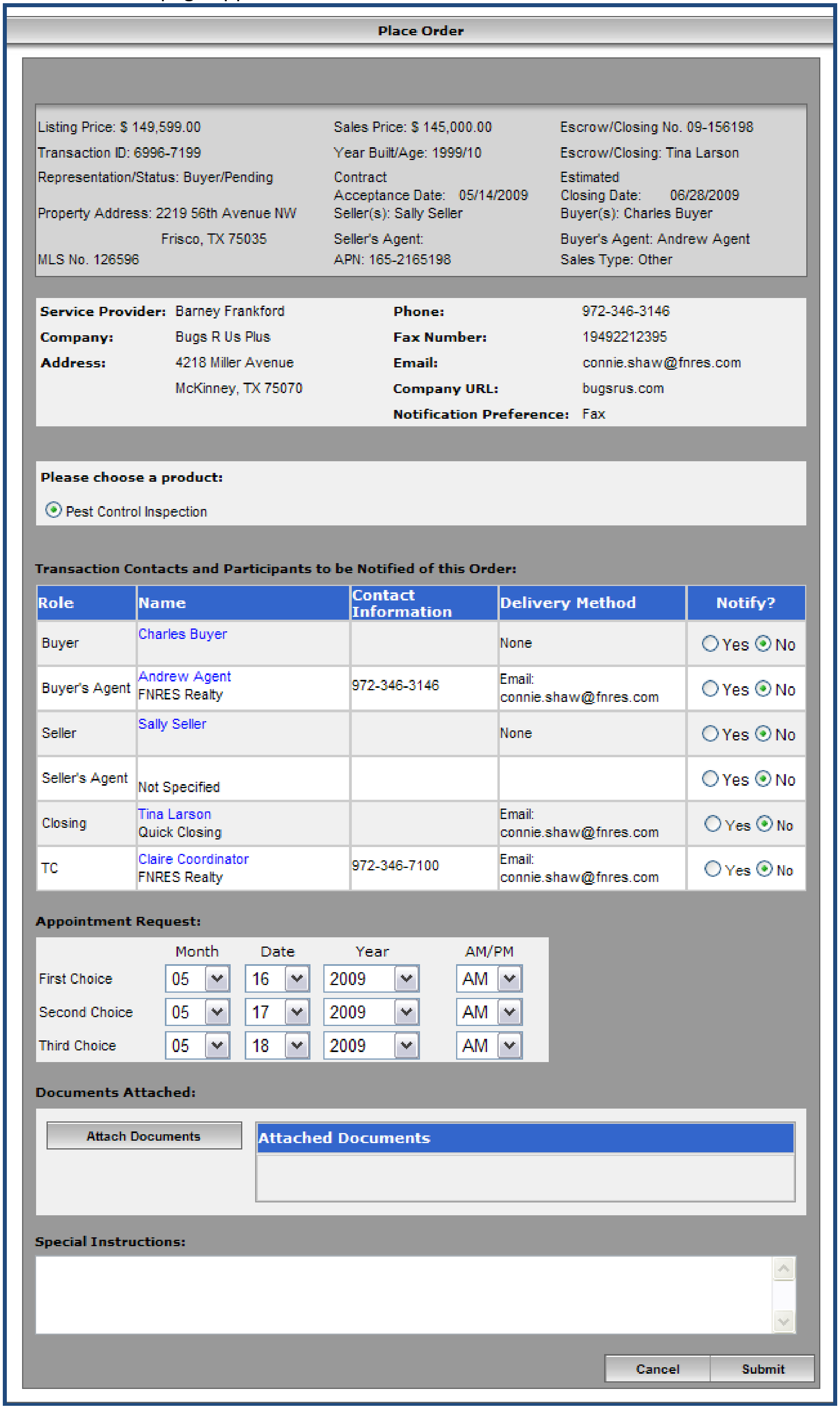


2. Under **Providers,** search for **Preferred Providers** or choose to display **All**
3. Under **Filter By,** you may narrow your search by Company Name, First Name or Last Name
4. Click **Search**
5. Select the appropriate Provider and click **Select**

Note: If you are unable to locate your provider, choose **Add New Company**. If you were able to locate the Company but not the appropriate Branch, choose **Add new Branch**. If you were successful in locating the Company and Branch however did not locate the provider, choose **Add New Contact**.

Note: If the provider is already a contact within the transaction, s/he will not show display in the search results.

The **Place Order** page appears.



Place Order

Listing Price: $ 149,599.00	Sales Price: $ 145,000.00	Escrow/Closing No. 09-156198
Transaction ID: 6996-7199	Year Built/Age: 1999/10	Escrow/Closing: Tina Larson
Representation/Status: Buyer/Pending	Contract Acceptance Date: 05/14/2009	Estimated Closing Date: 06/28/2009
Property Address: 2219 56th Avenue NW	Seller(s): Sally Seller	Buyer(s): Charles Buyer
Frisco, TX 75035	Seller's Agent:	Buyer's Agent: Andrew Agent
MLS No. 126596	APN: 165-2165198	Sales Type: Other

Service Provider:	Barney Frankford	**Phone:**	972-346-3146
Company:	Bugs R Us Plus	**Fax Number:**	19492212395
Address:	4218 Miller Avenue	**Email:**	connie.shaw@fnres.com
	McKinney, TX 75070	**Company URL:**	bugsrus.com
		Notification Preference:	Fax

Please choose a product:

Pest Control Inspection

Transaction Contacts and Participants to be Notified of this Order:

Role	Name	Contact Information	Delivery Method	Notify?
Buyer	Charles Buyer		None	Yes No
Buyer's Agent	Andrew Agent FNRES Realty	972-346-3146	Email: connie.shaw@fnres.com	Yes No
Seller	Sally Seller		None	Yes No
Seller's Agent	Not Specified			Yes No
Closing	Tina Larson Quick Closing		Email: connie.shaw@fnres.com	Yes No
TC	Claire Coordinator FNRES Realty	972-346-7100	Email: connie.shaw@fnres.com	Yes No

Appointment Request:

	Month	Date	Year	AM/PM
First Choice	05	16	2009	AM
Second Choice	05	17	2009	AM
Third Choice	05	18	2009	AM

Documents Attached:

Attach Documents

Attached Documents

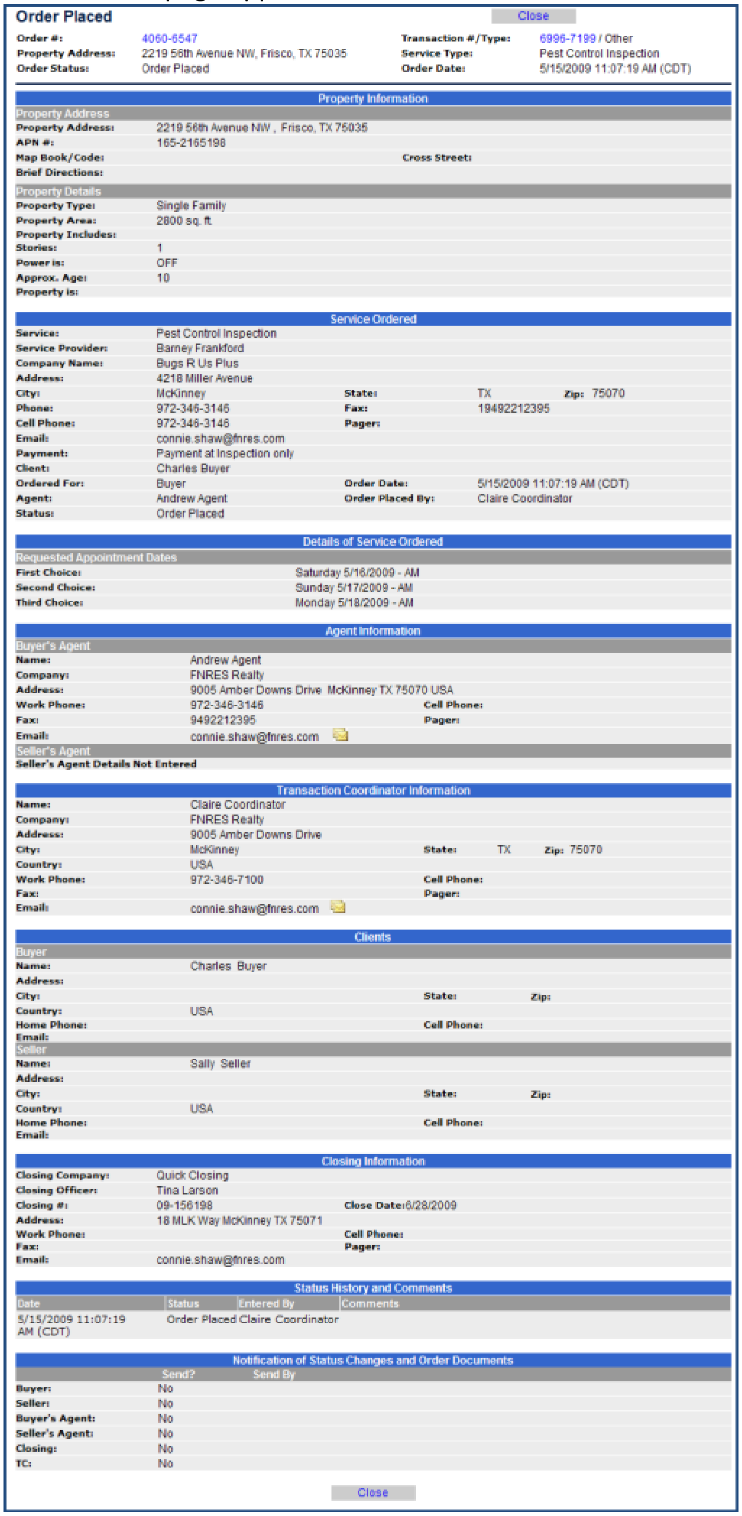
Special Instructions:

Cancel Submit

6. Select the **Contacts** to be notified of the order.

7. Select your First, Second and Third Choice **Appointment Request** if placing an order for inspections (or other appointments) or enter other details to update order information
8. If you want to make documents available to the provider, click **Upload Documents**, enter the **Document Name**, select the file, and click **Submit**.
9. Enter any **Special Instructions**.
10. Click **Submit**. The

Order Placed page appears.



Order Placed
Close

Order #: 4060-6547
Transaction #/Type: 6996-7199 / Other
Property Address: 2219 56th Avenue NW, Frisco, TX 75035
Service Type: Pest Control Inspection
Order Status: Order Placed
Order Date: 5/15/2009 11:07:19 AM (CDT)

Property Information

Property Address

Property Address: 2219 56th Avenue NW , Frisco, TX 75035
APN #: 165-2165198
Map Book/Code:
Cross Street:
Brief Directions:

Property Details

Property Type: Single Family
Property Area: 2800 sq. ft
Property Includes:
Stories: 1
Power is: OFF
Approx. Age: 10
Property is:

Service Ordered

Service: Pest Control Inspection
Service Provider: Barney Frankford
Company Name: Bugs R Us Plus
Address: 4218 Miller Avenue
City: McKinney
State: TX
Zip: 75070
Phone: 972-346-3146
Fax: 19492212395
Cell Phone: 972-346-3146
Pager:
Email: connie.shaw@fnres.com
Payment: Payment at Inspection only
Client: Charles Buyer
Ordered For: Buyer
Order Date: 5/15/2009 11:07:19 AM (CDT)
Agent: Andrew Agent
Order Placed By: Claire Coordinator
Status: Order Placed

Details of Service Ordered

Requested Appointment Dates

First Choice: Saturday 5/16/2009 - AM
Second Choice: Sunday 5/17/2009 - AM
Third Choice: Monday 5/18/2009 - AM

Agent Information

Buyer's Agent

Name: Andrew Agent
Company: FNRES Realty
Address: 9005 Amber Downs Drive McKinney TX 75070 USA
Work Phone: 972-346-3146
Cell Phone:
Fax: 9492212395
Pager:
Email: connie.shaw@fnres.com

Seller's Agent

Seller's Agent Details Not Entered

Transaction Coordinator Information

Name: Claire Coordinator
Company: FNRES Realty
Address: 9005 Amber Downs Drive
City: McKinney
State: TX
Zip: 75070
Country: USA
Work Phone: 972-346-7100
Cell Phone:
Fax:
Pager:
Email: connie.shaw@fnres.com

Clients

Buyer

Name: Charles Buyer
Address:
City:
State:
Zip:
Country: USA
Home Phone:
Cell Phone:
Email:

Seller

Name: Sally Seller
Address:
City:
State:
Zip:
Country: USA
Home Phone:
Cell Phone:
Email:

Closing Information

Closing Company: Quick Closing
Closing Officer: Tina Larson
Closing #: 09-156198
Close Date: 6/28/2009
Address: 18 MLK Way McKinney TX 75071
Work Phone:
Cell Phone:
Fax:
Pager:
Email: connie.shaw@fnres.com

Status History and Comments

Date	Status	Entered By	Comments
5/15/2009 11:07:19 AM (CDT)	Order Placed	Claire Coordinator	

Notification of Status Changes and Order Documents

	Send?	Send By
Buyer:	No	
Seller:	No	
Buyer's Agent:	No	
Seller's Agent:	No	
Closing:	No	
TC:	No	

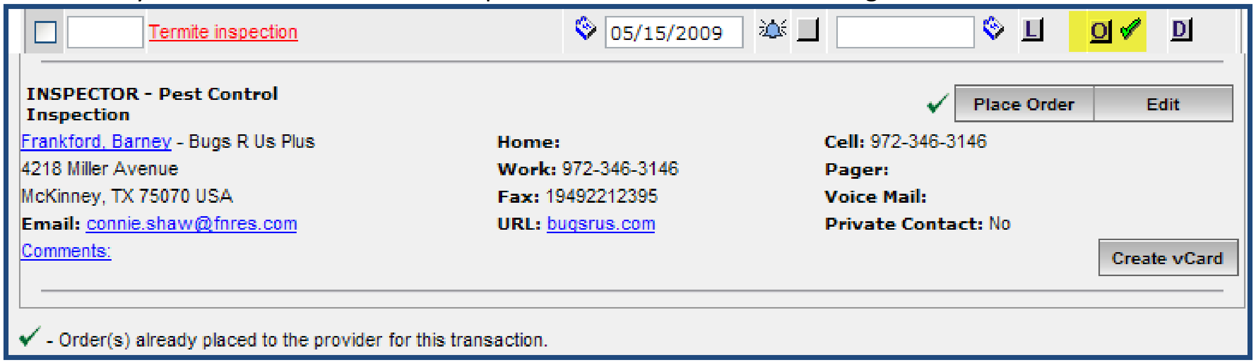
Close

11. Click **Close**.

Your order has been sent to the service provider by email or fax (depending on the users notification settings).

Once you've placed an order through your activity, the service providers contact information is immediately added to the **Contacts** page of your transaction.

Your activity is noted that the order was placed as well as the Contact Page notation.



Maintaining Transactions

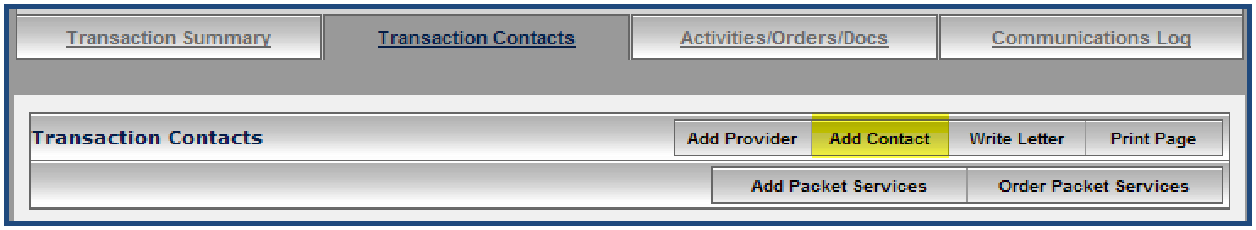
After you create a transaction, you can modify the information, if necessary. For example, you can:

1. Add contacts to your file
2. Add Providers to your file
3. Add or order packet services

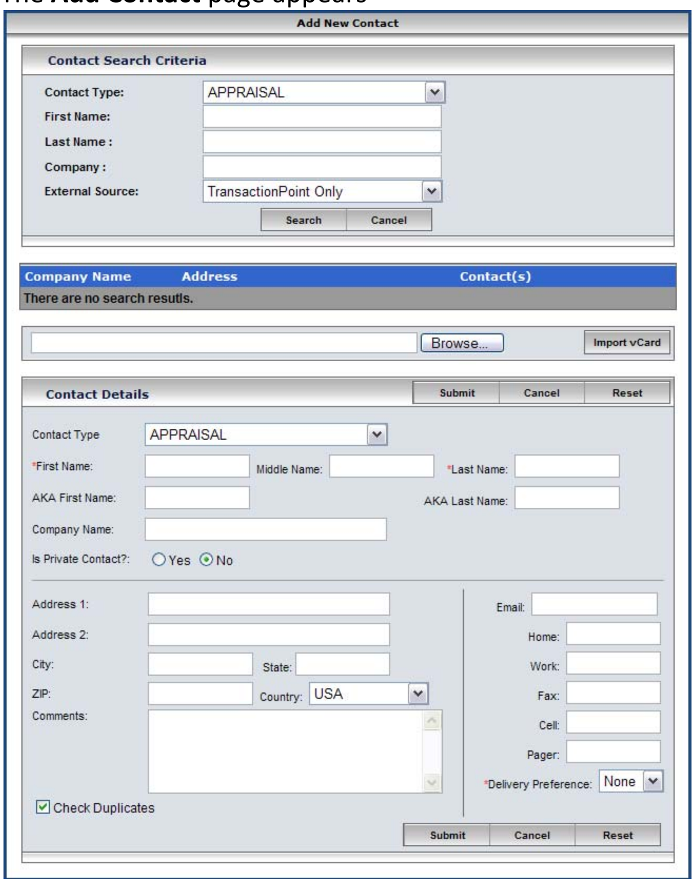
Adding Contacts

Adding contacts to a file allows the contact access to limited information within the transaction. Click on the Transaction ID to access the file.

1. Click **Transaction Contacts**.
2. Click **Add Contact**.



The **Add Contact** page appears



3. Select the **Contact Type**
4. Enter **Search** criteria if you are searching for an existing contact within the system, Click **Search**. The page refreshes to show contacts that match your criteria. Select the contact to add. Click **Submit**.
5. Enter the users contact details if you are adding a new contact to the system/file. Click **Submit.**

Note: Contacts differ from providers. Contacts have limited access to transaction details within the file whereas a Provider may have more interactive access. Providers have the ability to receive orders, accept orders and add documents to their orders. Contacts may only fax documents to the transaction.

Note: Adding Co-Agents: Transaction access for a co-agent is determined by several factors:

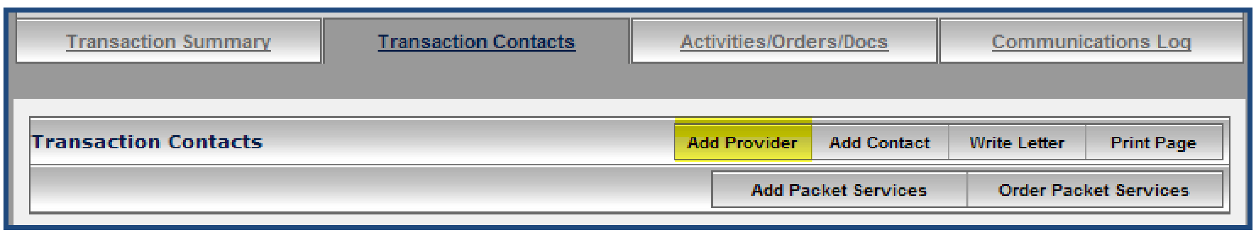
1. If the primary and co-agents are both Full Access Agents, then the co-agent will have full access.
2. If the primary agent's access is Full and the co-agent's access is View Only, then the co-agent will have view only access.
3. If the primary agent's access is View Only and the co-agent's access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

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.

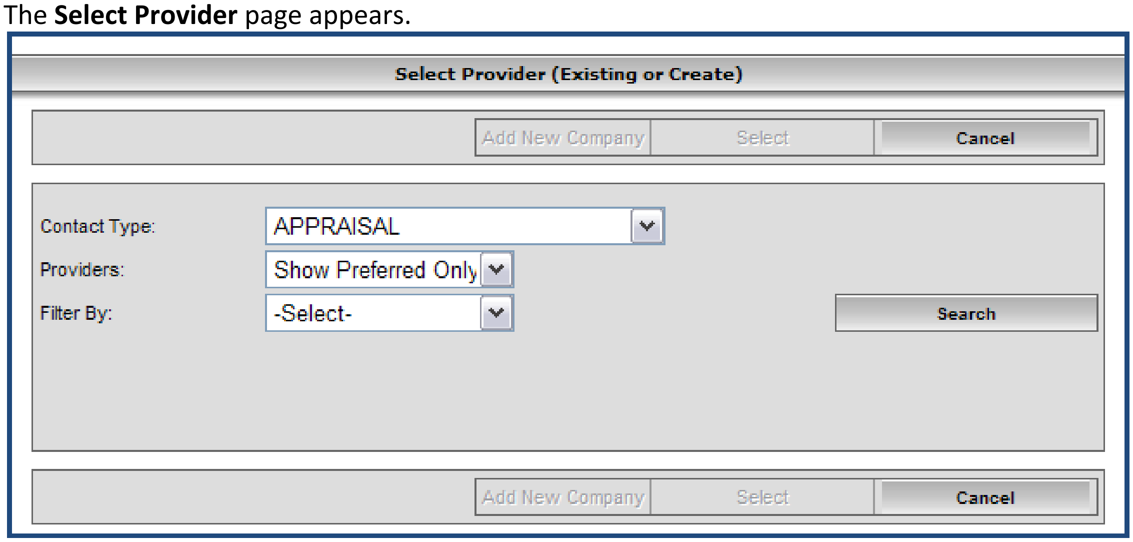
Adding Providers

Providers have the ability to interact within a transaction and may have access to additional details as necessary. Example: Title/Escrow Providers will have access to contacts and activities listed within the transaction.

1. Click **Transaction Contacts**
2. Click **Add Provider**



The **Select Provider** page appears.



3. Select the **Contact Type**.
4. Under **Providers,** select Show **Preferred Only** or choose to display **All**
5. Under **Filter By,** you may narrow your search by Company Name, First Name or Last Name (Enter a min. of 2 characters when searching)
6. Click **Search**

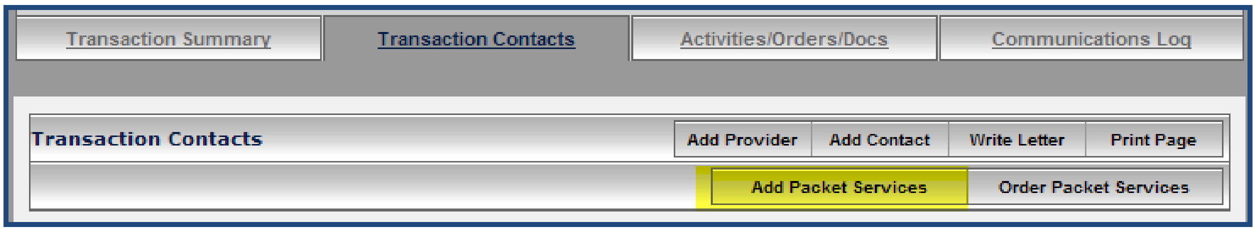
7. Select the appropriate Provider and click **Select**

Note: If you are unable to locate your provider, choose **Add New Company**. If you were able to locate the Company but not the appropriate Branch, choose **Add new Branch**. If you were successful in locating the Company and Branch however did not locate the provider, choose **Add New Contact**.

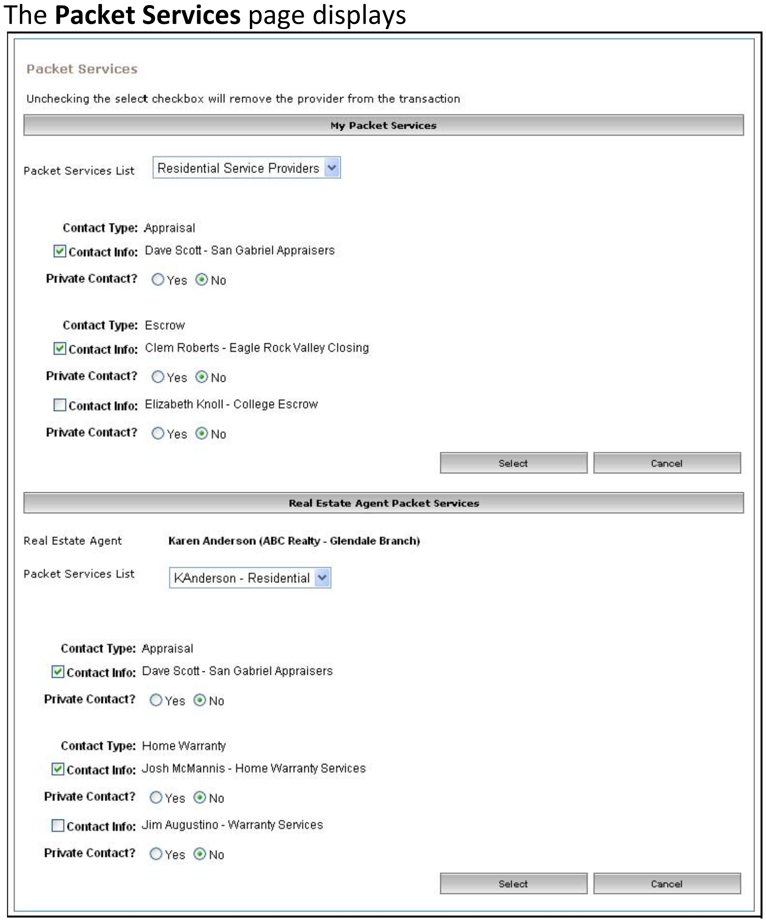
Adding Packet Services

Packet Services allows you the ability to add multiple service providers to your file all at once. Packet Services can be set up by the Agent or by the Transaction Coordinator under the **Profile** page. Below you will find instructions on adding these packets to your file.

1. Click **Transaction Contacts**
2. Click **Add Packet Services**



The **Packet Services** page displays



3. In the **Packet Services** page select the list you want to add.
   a. Select a Transaction Coordinator's list from the **My Packet Services** section.
   b. Select an agent's list from the **Real Estate Agent Packet Services** section.
4. Decide if you want contact information to be kept private or be available publicly by selecting the appropriate option for each service provider.

5. 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.

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

Modifying Packet Services List

1. To remove a provider, clear the check box adjacent to that provider.
2. 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.

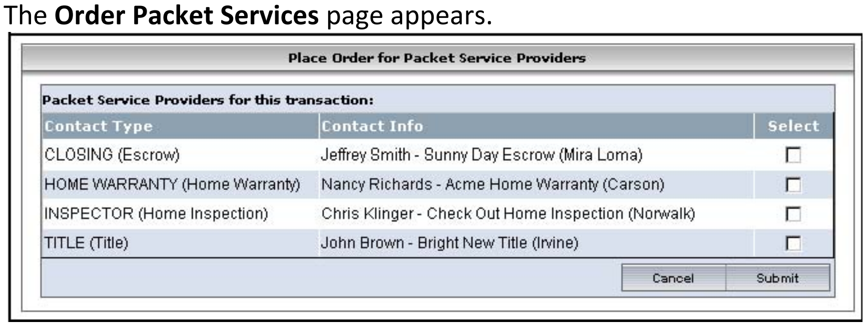
Note: For details about setting up packet services, refer to ***Setting Up Packet Services*** in the Profiles & Preferences section of this guide.

Once you have added packet services to your contacts page, you can now order packet services.

Ordering Packet Services

1. Click **Transaction Contacts**
2. Click **Order Packet Services**

The **Order Packet Services** page appears.



Place Order for Packet Service Providers

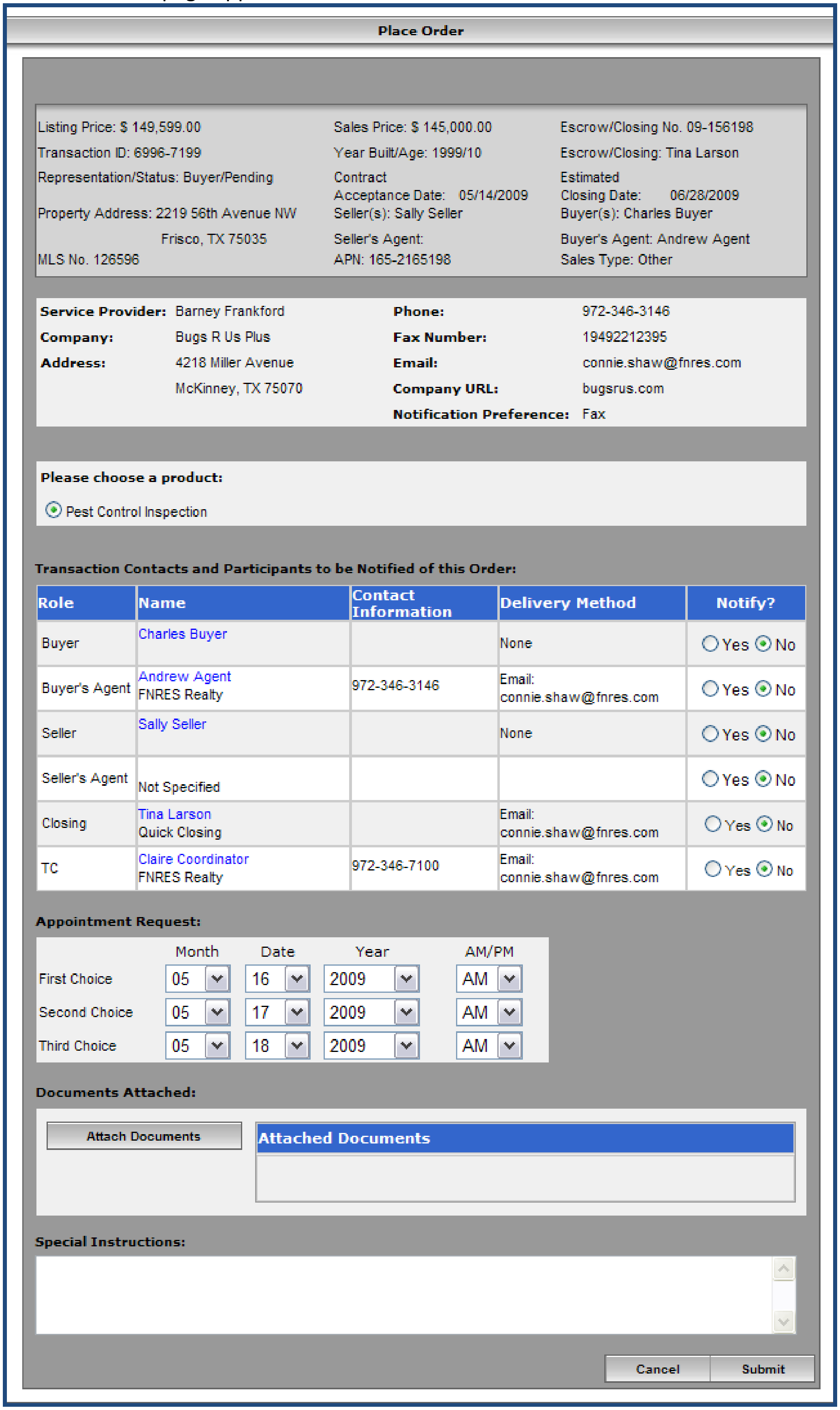
Packet Service Providers for this transaction:

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

3. Select the providers whose services you want to order.
4. Click **Submit**.

The **Place Order** page appears.



Place Order

Listing Price: $ 149,599.00	Sales Price: $ 145,000.00	Escrow/Closing No. 09-156198
Transaction ID: 6996-7199	Year Built/Age: 1999/10	Escrow/Closing: Tina Larson
Representation/Status: Buyer/Pending	Contract Acceptance Date: 05/14/2009	Estimated Closing Date: 06/28/2009
Property Address: 2219 56th Avenue NW	Seller(s): Sally Seller	Buyer(s): Charles Buyer
Frisco, TX 75035	Seller's Agent:	Buyer's Agent: Andrew Agent
MLS No. 126596	APN: 165-2165198	Sales Type: Other

Service Provider:	Barney Frankford	**Phone:**	972-346-3146
Company:	Bugs R Us Plus	**Fax Number:**	19492212395
Address:	4218 Miller Avenue	**Email:**	connie.shaw@fnres.com
	McKinney, TX 75070	**Company URL:**	bugsrus.com
		Notification Preference:	Fax

Please choose a product:

Pest Control Inspection

Transaction Contacts and Participants to be Notified of this Order:

Role	Name	Contact Information	Delivery Method	Notify?
Buyer	Charles Buyer		None	Yes No
Buyer's Agent	Andrew Agent FNRES Realty	972-346-3146	Email: connie.shaw@fnres.com	Yes No
Seller	Sally Seller		None	Yes No
Seller's Agent	Not Specified			Yes No
Closing	Tina Larson Quick Closing		Email: connie.shaw@fnres.com	Yes No
TC	Claire Coordinator FNRES Realty	972-346-7100	Email: connie.shaw@fnres.com	Yes No

Appointment Request:

	Month	Date	Year	AM/PM
First Choice	05	16	2009	AM
Second Choice	05	17	2009	AM
Third Choice	05	18	2009	AM

Documents Attached:

Attach Documents

Attached Documents

Special Instructions:

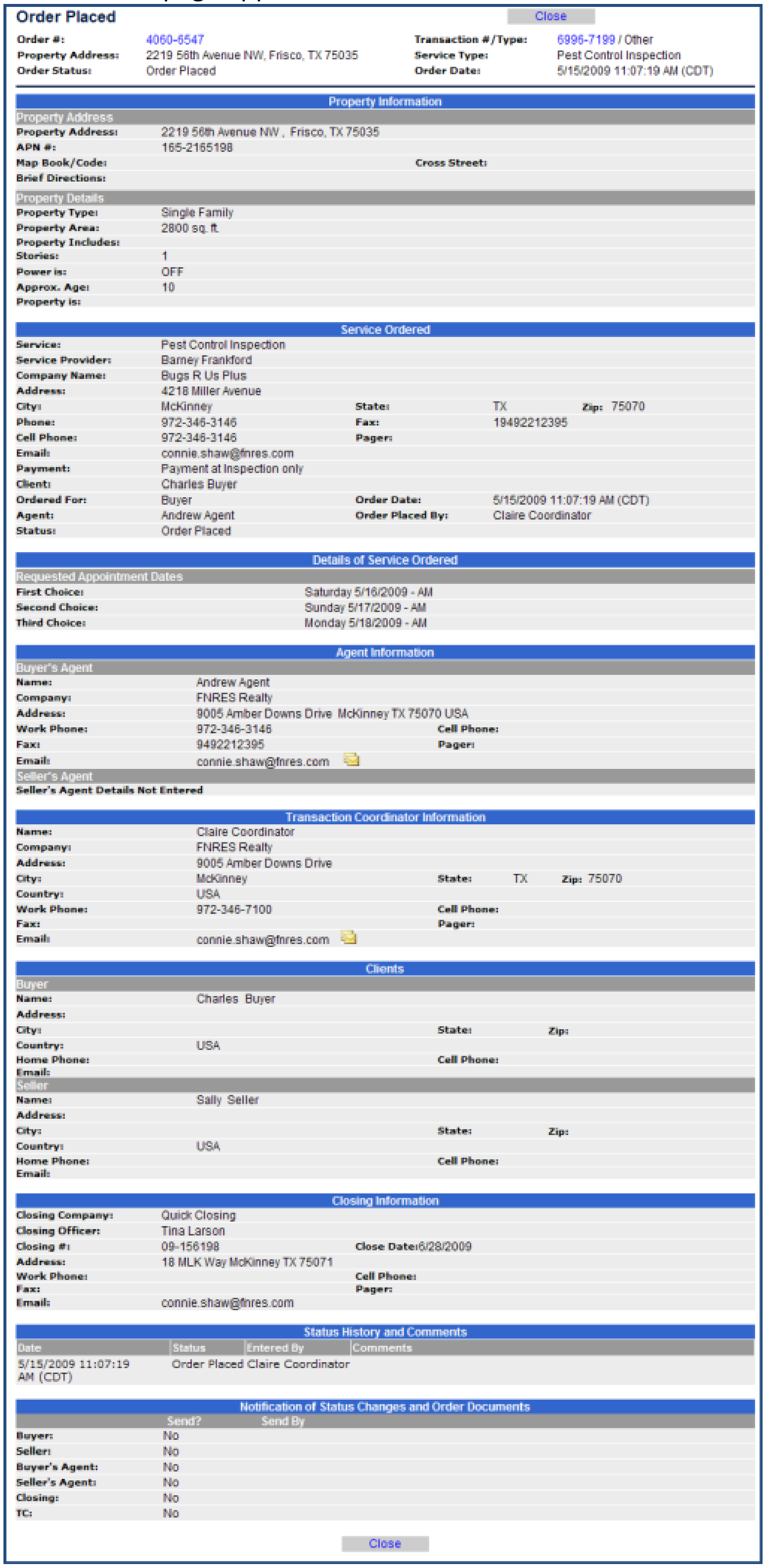
Cancel Submit

1. Select the **Contacts** to be notified of the order.
2. Select your First, Second and Third Choice **Appointment Request** if placing an order for

inspections (or other appointments) or enter other details to update order information.

3. If you want to make documents available to the provider, click **Upload Documents**, enter the **Document Name**, select the file, and click **Submit**.
4. Enter any **Special Instructions**.
5. Click **Submit**. The

Order Placed page appears.



Order Placed

Close

Order #:	4060-6547	Transaction #/Type:	6996-7199 / Other
Property Address:	2219 56th Avenue NW, Frisco, TX 75035	Service Type:	Pest Control Inspection
Order Status:	Order Placed	Order Date:	5/15/2009 11:07:19 AM (CDT)

Property Information

Property Address

Property Address:	2219 56th Avenue NW , Frisco, TX 75035		
APN #:	165-2165198		
Map Book/Code:		Cross Street:	
Brief Directions:			

Property Details

Property Type:	Single Family
Property Area:	2800 sq. ft.
Property Includes:	
Stories:	1
Power is:	OFF
Approx. Age:	10
Property is:	

Service Ordered

Service:	Pest Control Inspection				
Service Provider:	Barney Frankford				
Company Name:	Bugs R Us Plus				
Address:	4218 Miller Avenue				
City:	McKinney	State:	TX	Zip:	75070
Phone:	972-346-3146	Fax:	19492212395		
Cell Phone:	972-346-3146	Pager:			
Email:	connie.shaw@fnres.com				
Payment:	Payment at Inspection only				
Client:	Charles Buyer				
Ordered For:	Buyer	Order Date:	5/15/2009 11:07:19 AM (CDT)		
Agent:	Andrew Agent	Order Placed By:	Claire Coordinator		
Status:	Order Placed				

Details of Service Ordered

Requested Appointment Dates

First Choice:	Saturday 5/16/2009 - AM
Second Choice:	Sunday 5/17/2009 - AM
Third Choice:	Monday 5/18/2009 - AM

Agent Information

Buyer's Agent

Name:	Andrew Agent		
Company:	FNRES Realty		
Address:	9005 Amber Downs Drive McKinney TX 75070 USA		
Work Phone:	972-346-3146	Cell Phone:	
Fax:	9492212395	Pager:	
Email:	connie.shaw@fnres.com		

Seller's Agent

Seller's Agent Details Not Entered

Transaction Coordinator Information

Name:	Claire Coordinator				
Company:	FNRES Realty				
Address:	9005 Amber Downs Drive				
City:	McKinney	State:	TX	Zip:	75070
Country:	USA				
Work Phone:	972-346-7100	Cell Phone:			
Fax:		Pager:			
Email:	connie.shaw@fnres.com				

Clients

Buyer

Name:	Charles Buyer				
Address:					
City:		State:		Zip:	
Country:	USA				
Home Phone:		Cell Phone:			
Email:					

Seller

Name:	Sally Seller				
Address:					
City:		State:		Zip:	
Country:	USA				
Home Phone:		Cell Phone:			
Email:					

Closing Information

Closing Company:	Quick Closing		
Closing Officer:	Tina Larson		
Closing #:	09-156198	Close Date:	6/28/2009
Address:	18 MLK Way McKinney TX 75071		
Work Phone:		Cell Phone:	
Fax:		Pager:	
Email:	connie.shaw@fnres.com		

Status History and Comments

Date	Status	Entered By	Comments
5/15/2009 11:07:19 AM (CDT)	Order Placed	Claire Coordinator	

Notification of Status Changes and Order Documents

	Send?	Send By
Buyer:	No	
Seller:	No	
Buyer's Agent:	No	
Seller's Agent:	No	
Closing:	No	
TC:	No	

Close

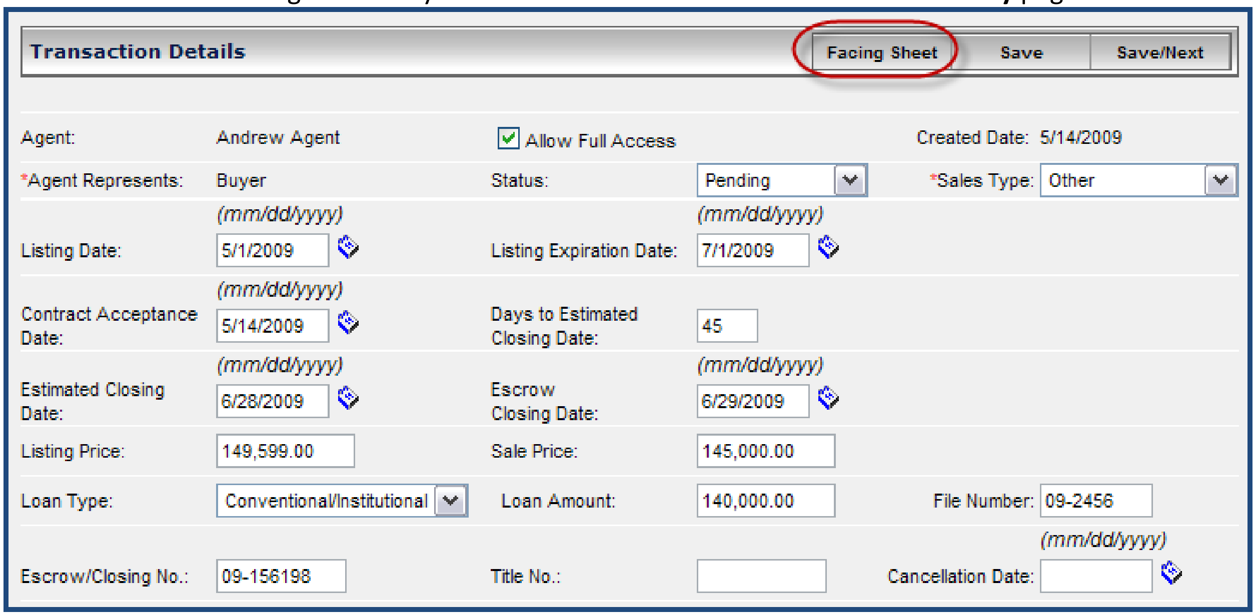
5. Click **Close**.

Your order has been sent to the service provider by email or fax (depending on the users notification settings).

Note: If you have more than one packet services order you are placing, you will be prompted through each order detail and once complete you will have a confirmation display of all orders placed.

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:

1. Transaction Coordinator
2. Closing Company
3. Title Company
4. Seller
5. Buyer
6. Seller's Agent
7. Buyer's Agent
8. Listing Commission
9. Selling Commission
10. Transaction Fees
11. Lender Information
12. 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.

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.

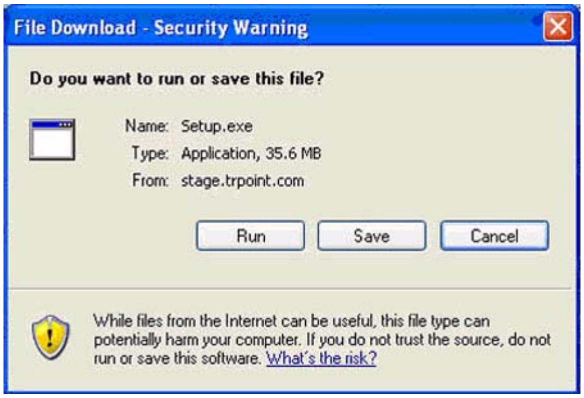
Note: Site Administrators can choose whether or not Agents have the ability to archive files. If you do not see the Archive Center link, contact your site administrator.

Downloading and Installing the Archive Utility

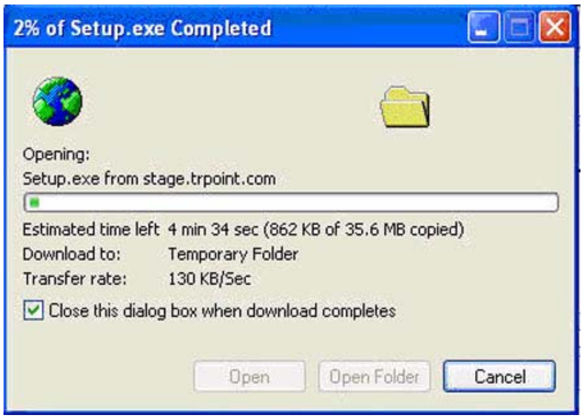
Note: If you have not installed the current TP Archive Utility, follow the steps below to install or update the software. This must be done before you burn CDs.

1. Go to your Transaction Point website and login. From the Main Navigational Toolbar, select **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:

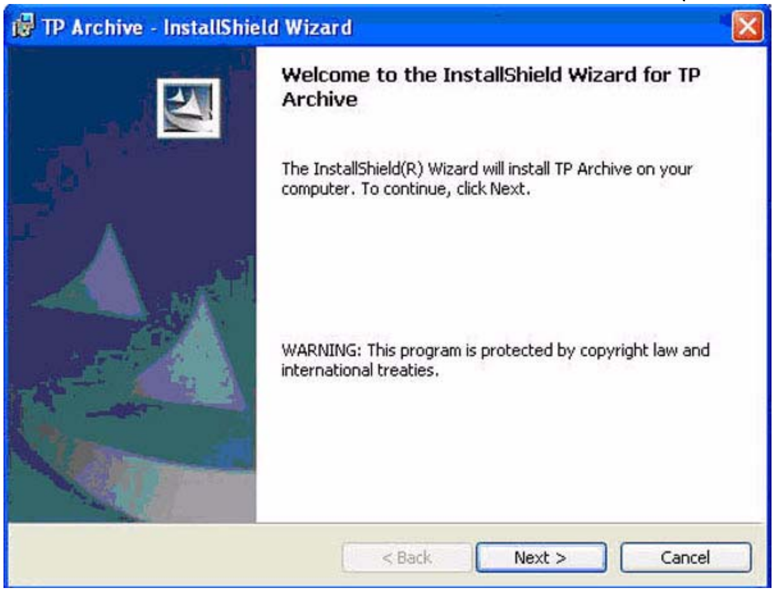


The screen below is shown to indicate that the software is installing on your computer:

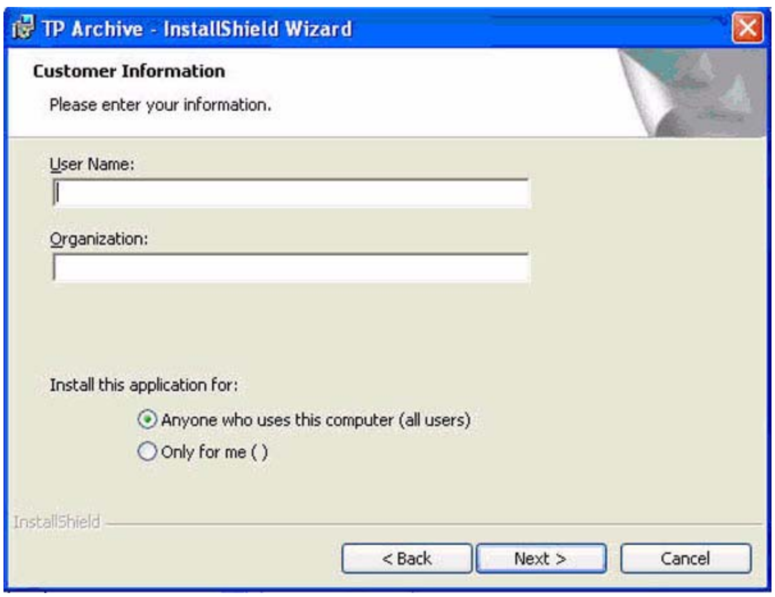


4. Click **Run** in the Security Warning window (shown below) that pops up.

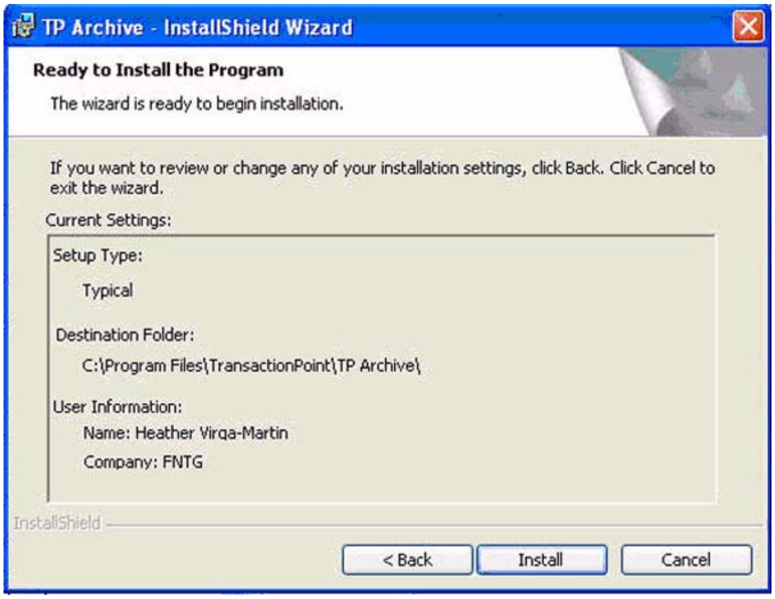
5. Click **Next** in the TP Archive-InstallShield Wizard window (shown below) that pops up.



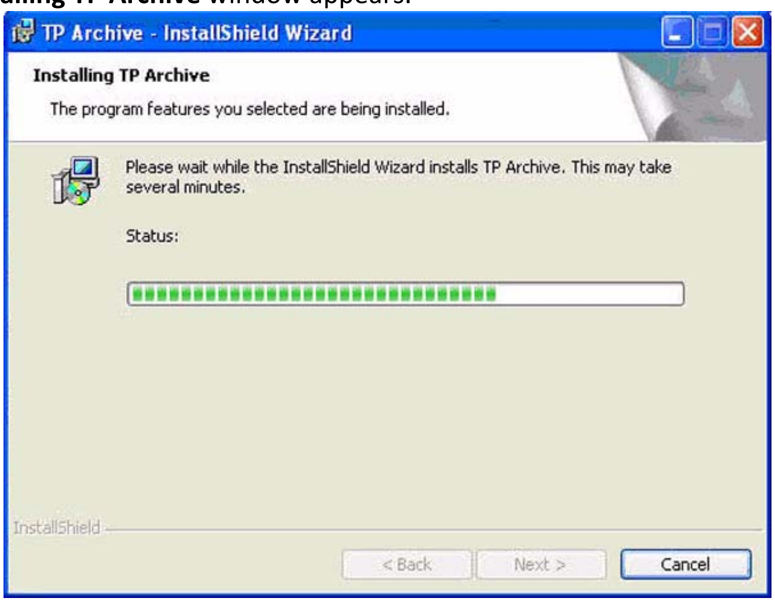
6. Type your name and company name, select **Anyone who uses this computer (all users)**, and click **Next**.



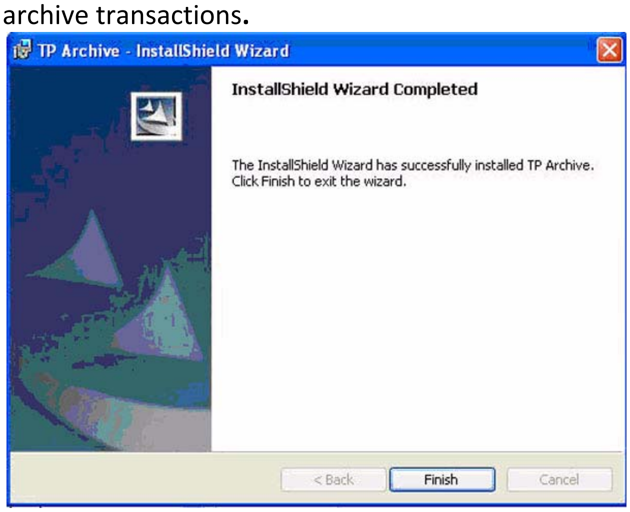
7. Click **Install**.



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.

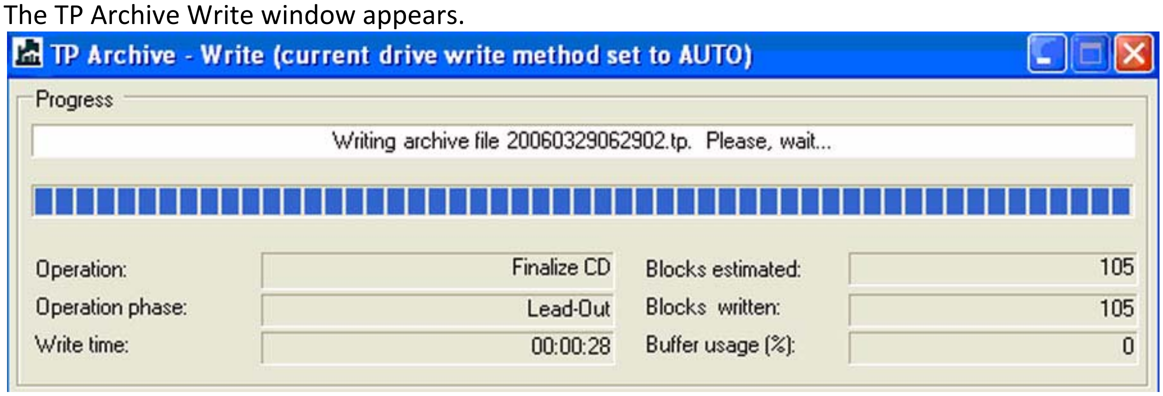
Custom - Allows you to archive a customized list of documents and activities. Customized archive is available when you upload documents directly to TransactionPoint or fax documents into TransactionPoint using the fax cover sheet. This feature can also be made available using defaults set in the Activities 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 - The Buyer archive will include transaction details, key dates, transaction contacts, public activities, order summary, public documents and any private documents where the Buyer has viewing access.

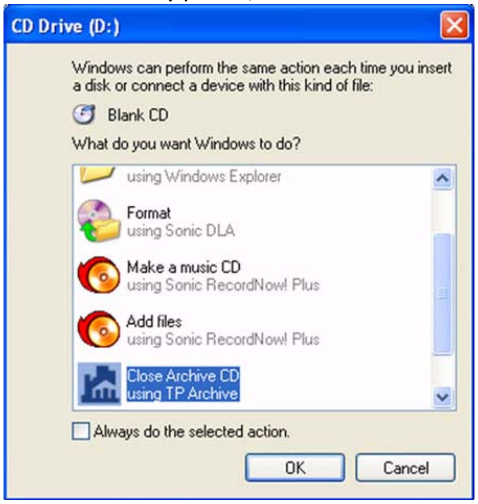
Seller - The Seller archive will include transaction details, key dates, transaction contacts, public activities, order summary, public documents and any private documents where the Seller has viewing access.

3. Insert a blank CD.
4. Click **Open**.

The TP Archive Write window appears.

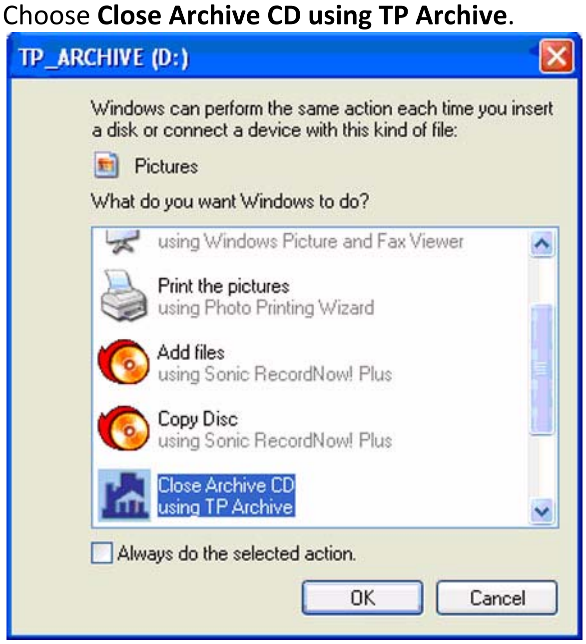


Note: If this window appears, click **Cancel**.



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

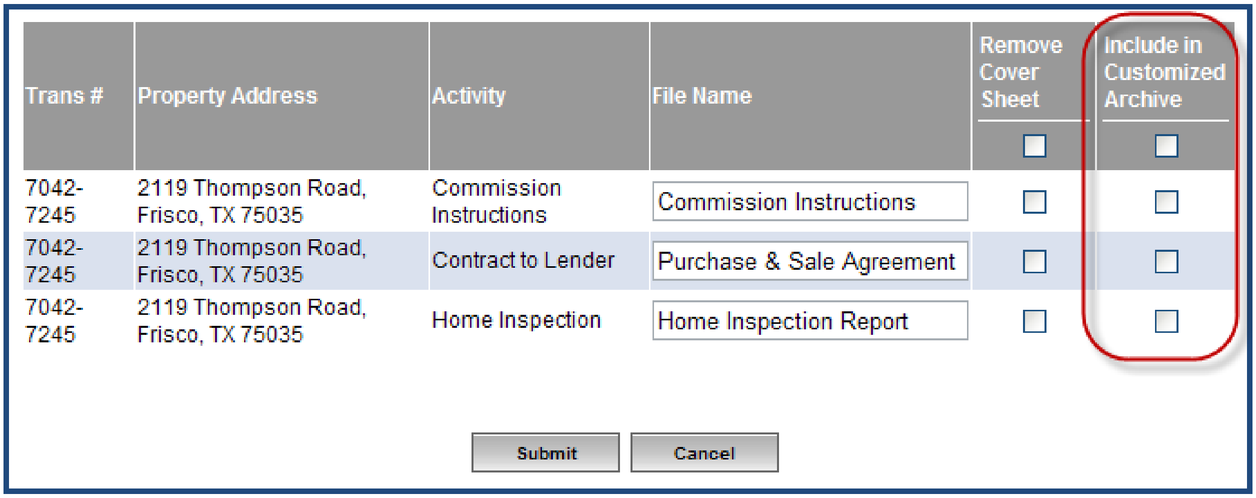
Archived on 9/14/2005 4:47:56 PM (PDT)

You can now print the summary.

Customizing Archive Options

Including a Document Using a Fax Cover Sheet

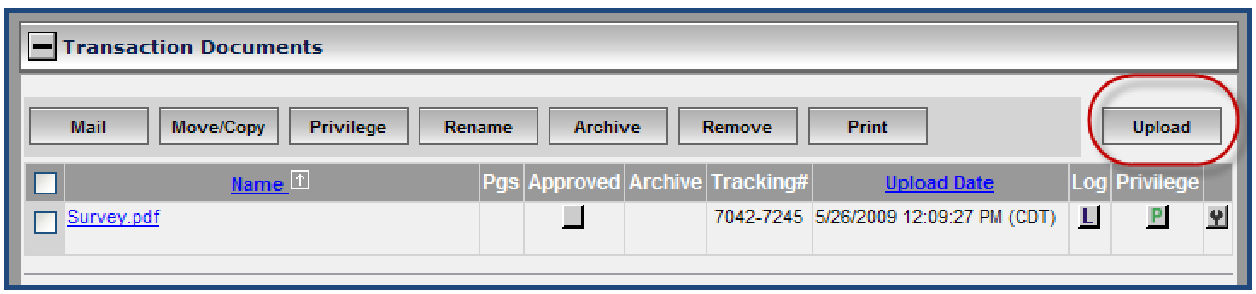
This feature is available in TransactionPoint anywhere that you can create a fax cover sheet. Once you choose to create a fax cover sheet, the following Fax Cover Sheet page appears. Check the **Include in Customized Archive** box; the faxed documents will be included on the Customized Archive CD you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



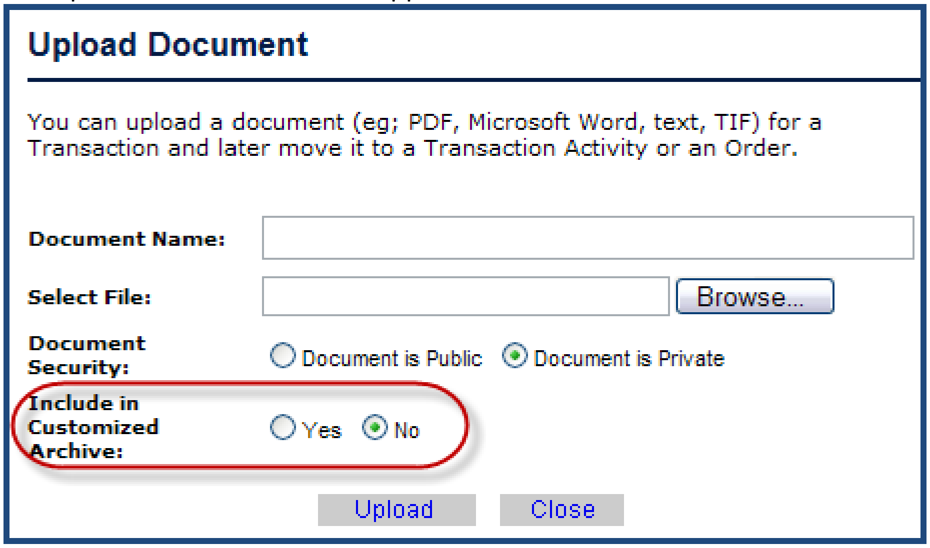
Including a Document Using the Upload Feature

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 **Upload**.
   (You can click on the “plus” sign to expand the Documents section within the **Activities/Orders/Docs** tab)



The Upload Document window appears:



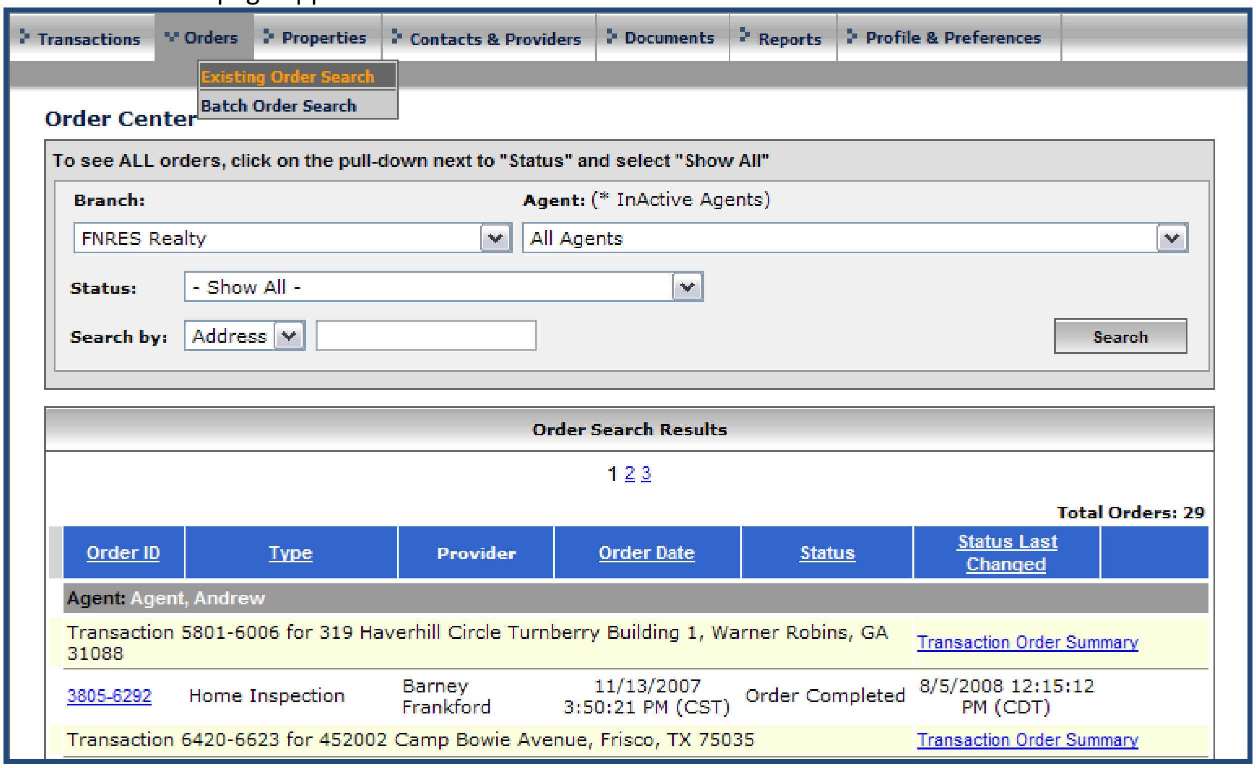
2. Click **Yes** next to **Include in Customized Archive**.

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.



Viewing Orders

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

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

4. Select the **Search By** option to search for orders by **Address**, **City**, **State**, **Zip**, **Order #**, or **Type**. (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.

5. 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.

Order Details | Comments | Documents

Order Details

Back to Order Center

Order #:	3805-6292	**Transaction #/Type:**	5801-6006 / Unspecified
Property Address:	319 Haverhill Circle, Warner Robins, GA 31088	**Service Type:**	Home Inspection
Order Status:	Order Completed	**Order Date:**	11/13/2007 3:50:22 PM (CST)

Property Information

Property Address

Property Address:	319 Haverhill Circle , Warner Robins, GA 31088		
APN #:			
Map Book/Code:		**Cross Street:**	
Brief Directions:			

Property Details

Property Type:	Single Family
Property Area:	1194 sq. ft.
Property Includes:	
Power is:	ON
Approx. Age:	5
Property is:	Owner Occupied

Service Ordered

Service:	Home Inspection				
Service Provider:	Barney Frankford				
Company Name:	Bugs R Us Plus				
Address:	4218 Miller Avenue				
City:	McKinney	**State:**	TX	**Zip:**	75070
Phone:	972-346-3146	**Fax:**	19492212395		
Cell Phone:	972-346-3146	**Pager:**			
Email:	connie.shaw@fnres.com				
Payment:	Payment at Inspection only				
Client:	Becki Cassidy				
Ordered For:	Buyer	**Order Date:**	11/13/2007 3:50:22 PM (CST)		
Agent:	Andrew Agent	**Order Placed By:**	Claire Coordinator		
Status:	Order Completed				

Details of Service Ordered

Appointment Date

Date:	Wednesday 8/6/2008 9:00:00 AM (CDT)
Duration:	08:00 Hrs

Agent Information

Buyer's Agent

Name:	Andrew Agent		
Company:	FNRES Realty		
Address:	9005 Amber Downs Drive McKinney TX 75070 USA		
Work Phone:	972-346-3146	**Cell Phone:**	
Fax:	9492212395	**Pager:**	
Email:	connie.shaw@fnres.com		

Seller's Agent

Seller's Agent Details Not Entered

Transaction Coordinator Information

Name:	Claire Coordinator				
Company:	FNRES Realty				
Address:	9005 Amber Downs Drive				
City:	McKinney	**State:**	TX	**Zip:**	75070
Country:	USA				
Work Phone:	972-346-7100	**Cell Phone:**			
Fax:		**Pager:**			
Email:	connie.shaw@fnres.com				

Clients

Buyer

Name:	Becki Cassidy				
Address:					
City:		**State:**		**Zip:**	
Country:	USA				
Home Phone:		**Cell Phone:**			
Email:	connie.shaw@fnres.com				

Seller

Seller's Details Not Entered

Closing Information

Closing Company:			
Closing Officer:			
Closing #:		**Close Date:**	
Address:			
Work Phone:		**Cell Phone:**	
Fax:		**Pager:**	
Email:			

Status History and Comments

Date	Status	Entered By	Comments
8/5/2008 12:15:12 PM (CDT)	Order Completed	Barney Frankford	Thank you for your business
8/5/2008 12:14:38 PM (CDT)	Order Accepted	Barney Frankford	Document "Acceptance Agreement" Uploaded.
8/5/2008 12:14:01 PM (CDT)	Order Accepted	Barney Frankford	Home is a mess. Needs work.
8/5/2008 12:13:07 PM (CDT)	Order Accepted	Barney Frankford	Will schedule meeting with home owner
11/13/2007 3:50:22 PM (CST)	Order Placed	Claire Coordinator	

Notification of Status Changes and Order Documents

	Send?	Send By
Buyer:	No	
Seller:	No	
Buyer's Agent:	No	
Seller's Agent:	No	
Closing:	No	
TC:	No	

Back

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:

1. Change status
2. Add comments
3. Upload documents
4. Edit the order

Order Details	Change Status	Comments	Documents	Edit Order

Order Details — Back to Order Center

Order #:	3838-6325	**Transaction #/Type:**	6420-6623 / Other
Property Address:	452002 Camp Bowie Avenue, Frisco, TX 75035	**Service Type:**	Home Inspection
Order Status:	Order Placed	**Order Date:**	1/29/2008 11:55:11 AM (CST)

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

Property Information			
Property Address			
Property Address:	452002 Camp Bowie Avenue , Frisco, TX 75035		
APN #:	75-25-1546		
Map Book/Code:		**Cross Street:**	
Brief Directions:			
Property Details			
Property Type:	Single Family		
Property Area:	2800 sq. ft.		
Property Includes:			
Stories:	1		
Power is:	OFF		
Approx. Age:	N/A		
Property is:	Owner Occupied		

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

1. Details about the service order
2. Information about the agent
3. Information on the Transaction Coordinator
4. Information about the client
5. Status history and comments

Middle Section of Order Detail Page

Agent Information			
Buyer's Agent			
Name:	Andrew Agent		
Company:	FNRES Realty		
Address:	9005 Amber Downs Drive McKinney TX 75070 USA		
Work Phone:	972-346-3146	**Cell Phone:**	
Fax:	9492212395	**Pager:**	
Email:	connie.shaw@fnres.com		
Seller's Agent			
Seller's Agent Details Not Entered			

Transaction Coordinator Information					
Name:	Claire Coordinator				
Company:	FNRES Realty				
Address:	9005 Amber Downs Drive				
City:	McKinney	**State:**	TX	**Zip:**	75070
Country:	USA				
Work Phone:	972-346-7100	**Cell Phone:**			
Fax:		**Pager:**			
Email:	connie.shaw@fnres.com				

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

Status History and Comments

Date	Status	Entered By	Comments
5/26/2009 11:24:14 AM (CDT)	Order Placed	Claire Coordinator	

LPS REAL ESTATE GROUP

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

1. Notice of status changes and order documents
2. Closing order details
3. Sale transaction information
4. Home owners association information

Bottom Section of Order Detail Page

Notification of Status Changes and Order Documents		
	Send?	Send By
Buyer:	No	
Seller:	No	
Buyer's Agent:	Yes	Email: connie.shaw@fnres.com
Seller's Agent:	No	
Closing:	No	
TC:	Yes	Email: connie.shaw@fnres.com

Closing Order Details	
Type of Title Insurance Coverage:	Don't Know
Status of Sale:	Property is in Contract

Sale Transaction Information					
Sales Price:					
Sale Date:		COE Date:			
Deposit:		Due Date:			
Increase Deposit:		Due Date:			
Commission To					
Buyer's Agent:		Seller's Agent:			
Refrral Fee Due:	Yes				
Agent Name:		Company:			
Address:					
City:		State:		Zip:	
Amount:	% of Buyer's Agent Side				
Other Info regarding the Transaction:		Don't Know			
Will power of Attorney used during transaction:		Don't Know			
Will Buyer's Fund be Send to Another Company:		Don't Know			
Will Seller's Fund be Send to Another Company:		Don't Know			
Comments to Closing officer regarding this Transaction:					

Home Owner Association Information	
Is Property Part of Home Owner Association?	No

Back

Back to Order Center

Changing Order Status

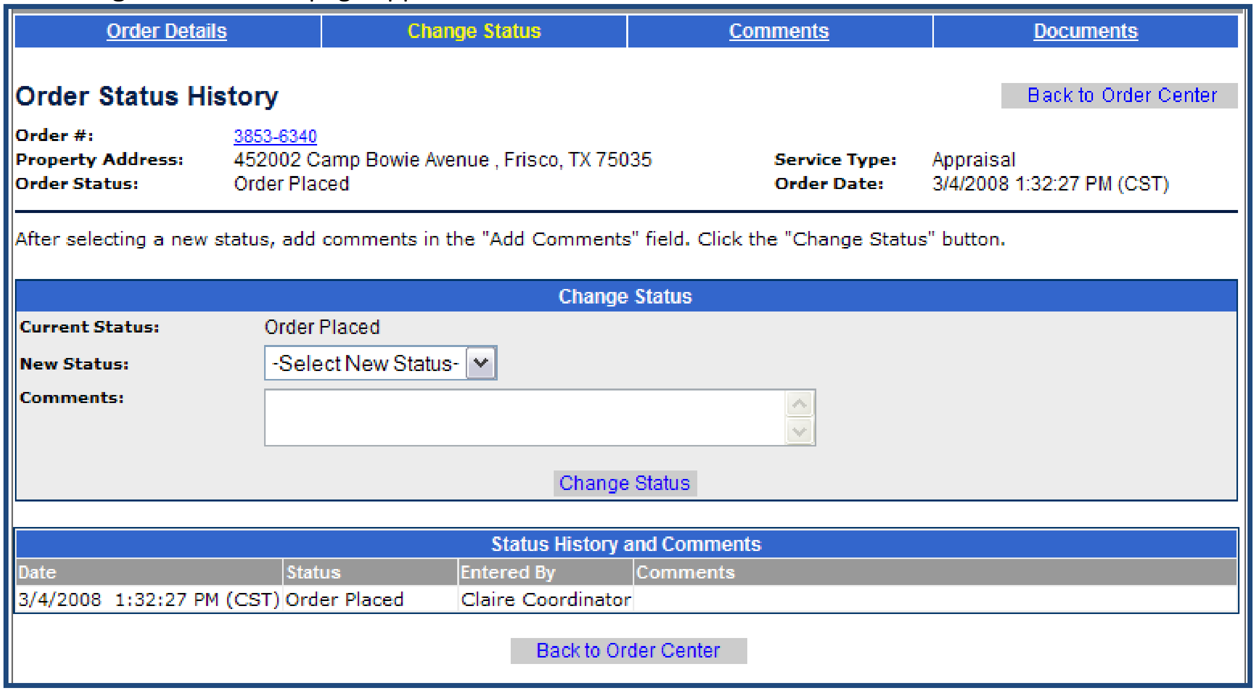
1. Click **Change Status** on the Order Detail page

Order Details	Change Status	Comments	Documents

Order Details — Back to Order Center

Order #:	3853-6340	Transaction #/Type:	6420-6623 / Other
Property Address:	452002 Camp Bowie Avenue, Frisco, TX 75035	Service Type:	Appraisal
Order Status:	Order Placed	Order Date:	3/4/2008 1:32:27 PM (CST)

The **Change Order Status** page appears

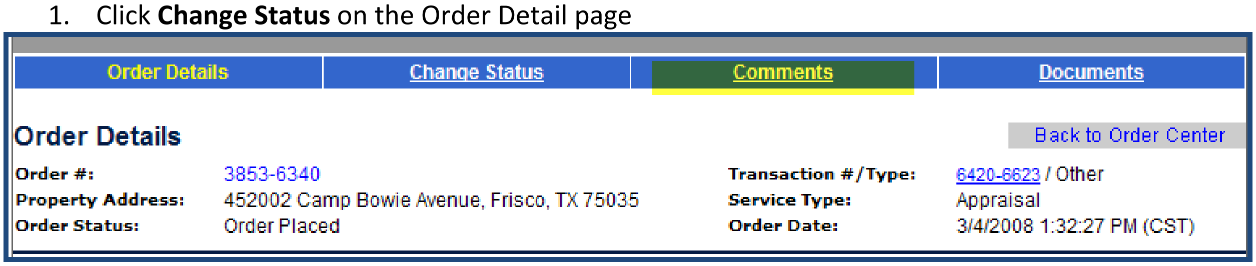


2. Select the **New Status**.
3. Add **Comments** to explain the reason for the status change.
4. Click **Change Status**.

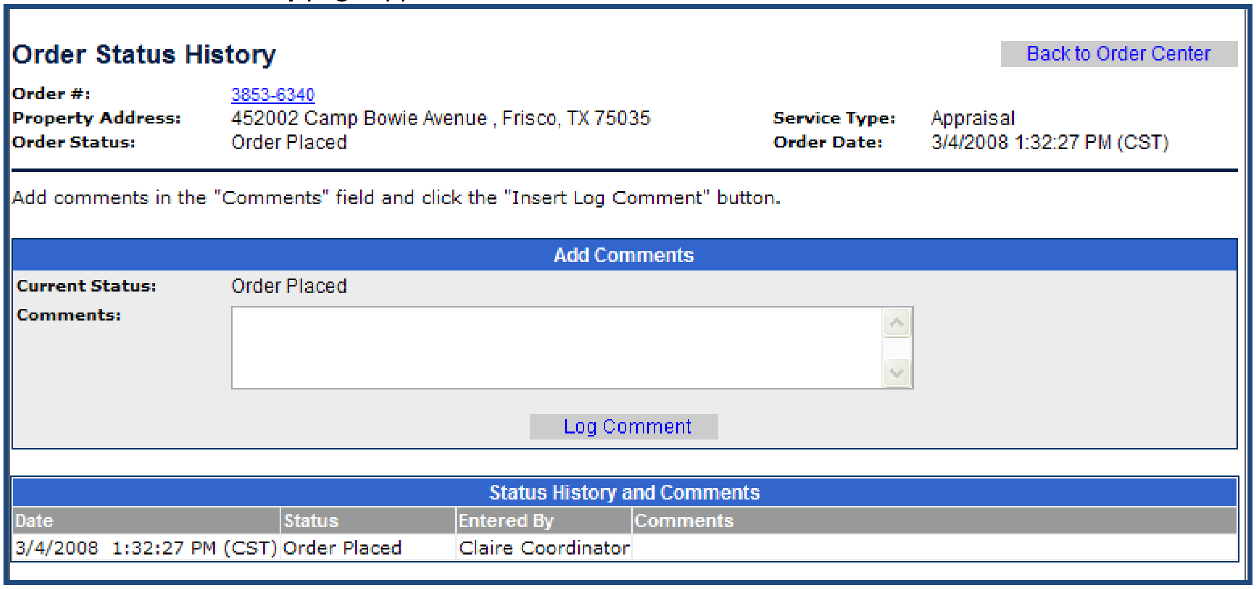
If you use the **Change Status** to cancel an order, an **Order Cancellation** page appears. Click **Yes** to confirm the order cancellation.

Adding Order Comments

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



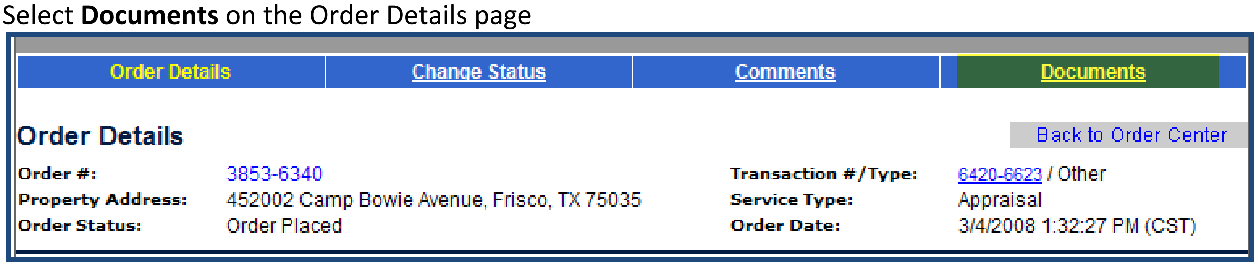
The **Order Status History** page appears.



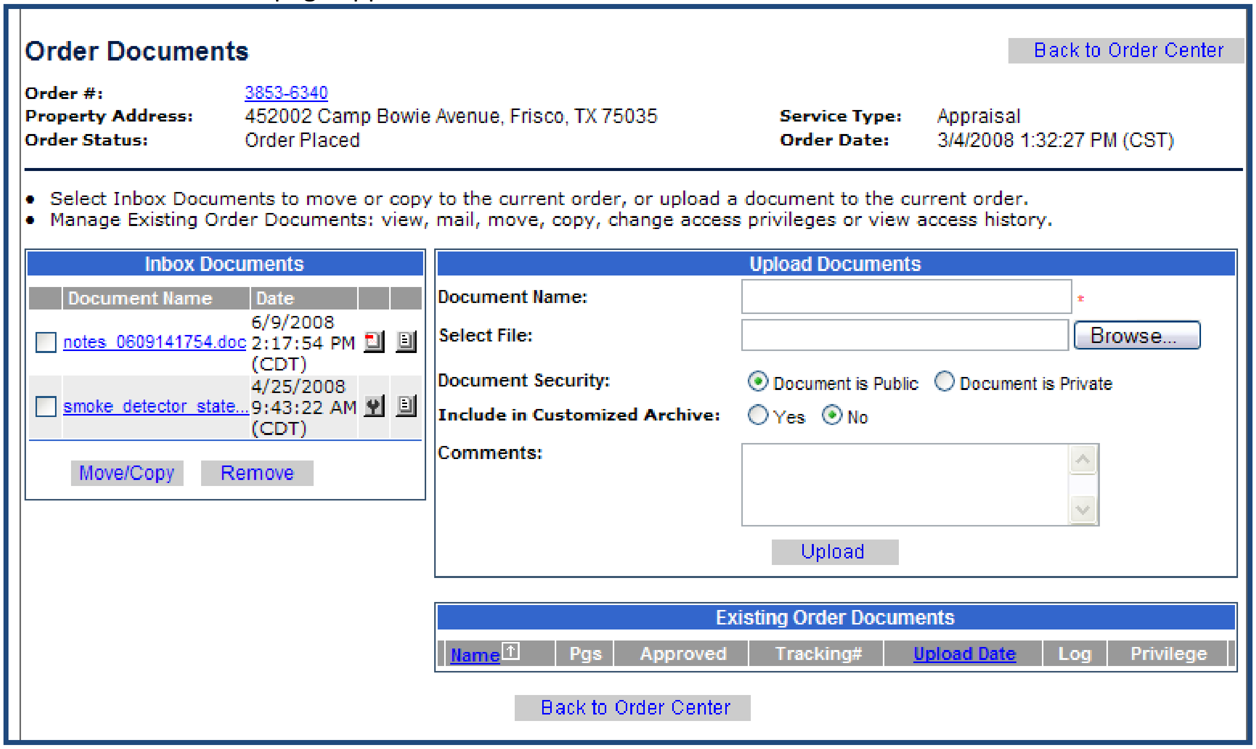
2. Enter the **Comments**.
3. Click **Log Comment**. The **Order Status History** page updates and displays the new comment.

Uploading Documents From Your Hard Drive to an Order

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



The **Order Documents** page appears.



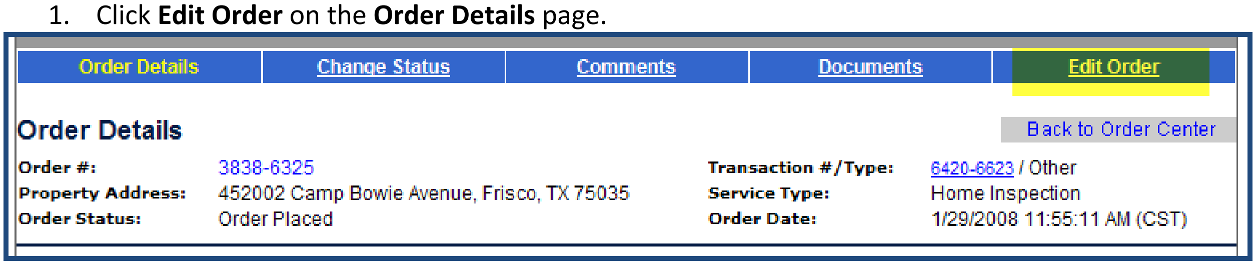
2. Type a **Document Name**.
3. Click **Browse** to search for the document.
4. Double-click on the name of the document you with to upload.
5. Select **Document Security**, and indicate whether this document should be included in the customized archive.
6. Type any **Comments**.
7. Click **Upload**.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

Note: 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.

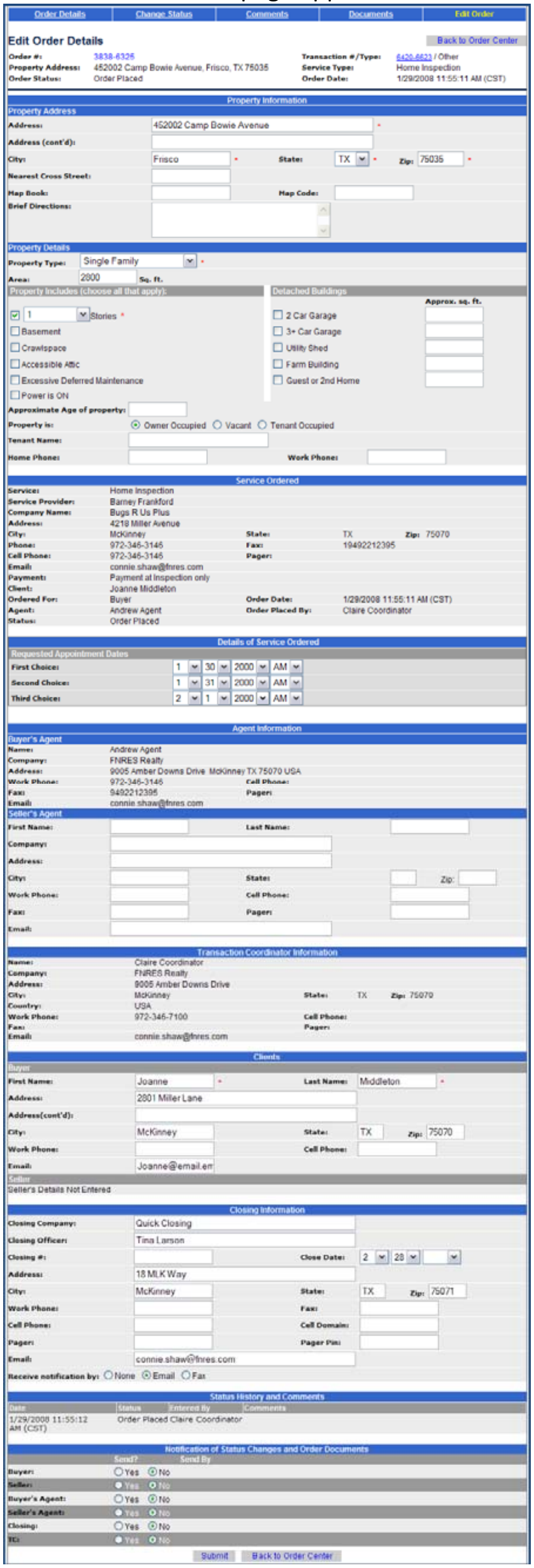
8. Click **Back to Order Center** after you have uploaded all documents for the property.

Editing an Order

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



The **Edit Order Detail** page appears.

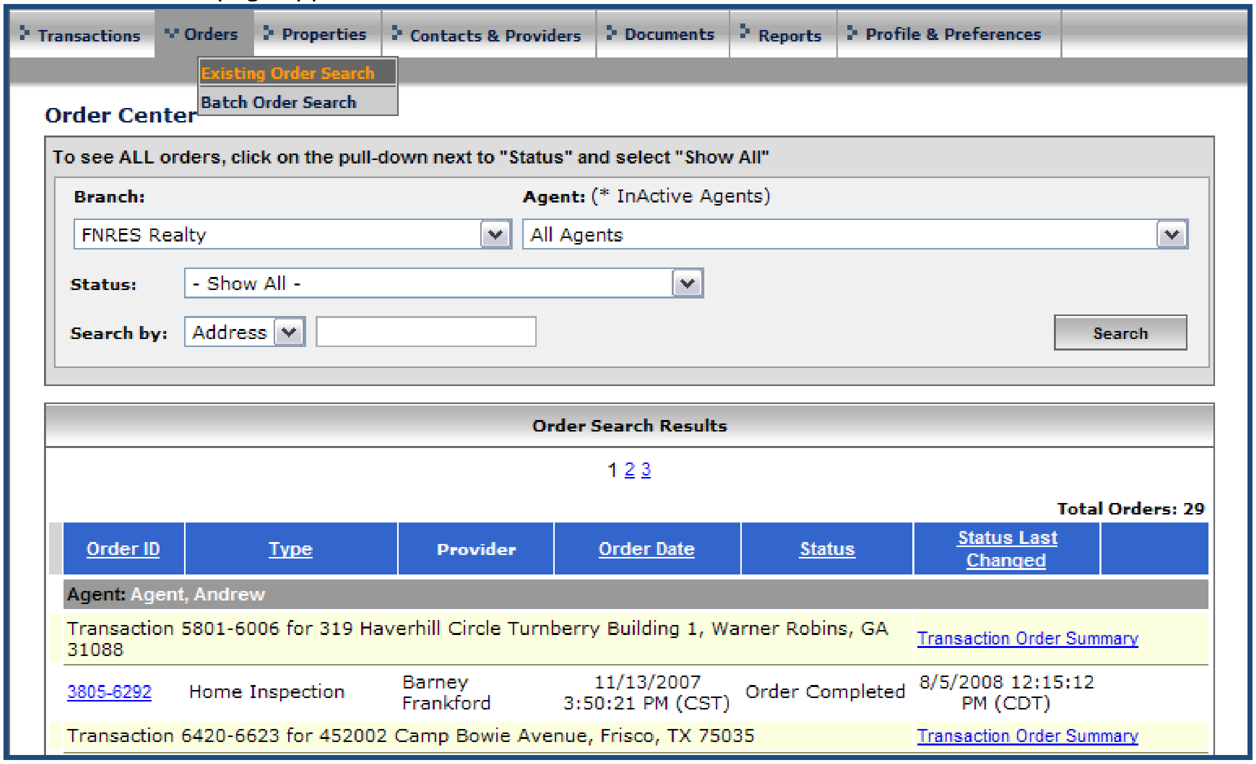


2. Make the necessary changes.
3. Click **Submit**.

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 6420-6623 for 452002 Camp Bowie Avenue, Frisco, TX 75035 — 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				
3838-6325	1/29/2008			
Lead/Paint Inspection				
Miscellaneous Inspection				
Mold Inspection				
Pest Control Inspection				
3841-6328	1/29/2008			
Plumbing Inspection				
Pool/spa Inspection				
Radon Inspection				
Roof Inspection				
Security/Alarm Inspection				
Septic/Sewer Inspection				
3857-6344	3/14/2008	3/14/2008		
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				
3853-6340	3/4/2008			
Credit				
Flood				
Home Services				
Home Warranty				
Loan (Document)				
Loans/Mortgage				
Mortgage Services				
Natural Hazard Disclosure				
Order Insurance Quote				
Professional Services				

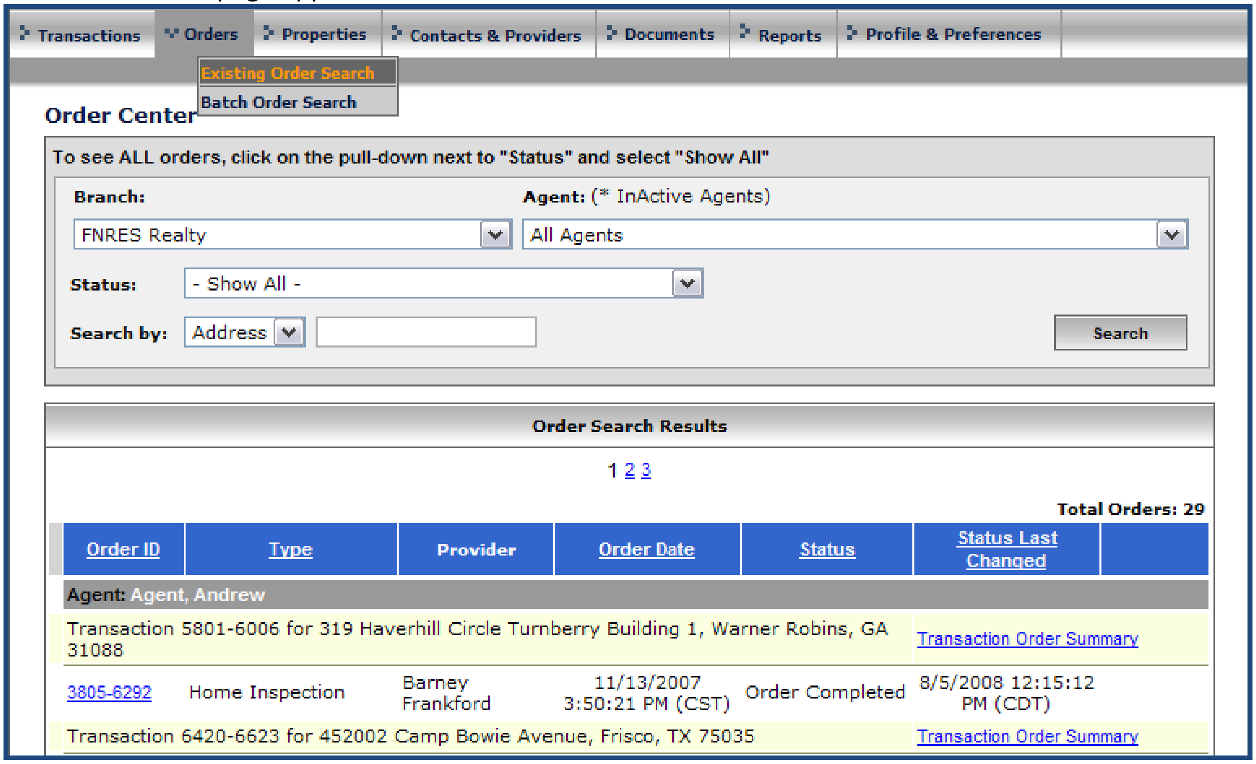
4. Click on an order number to view the **Order Details** page.

Removing an Order

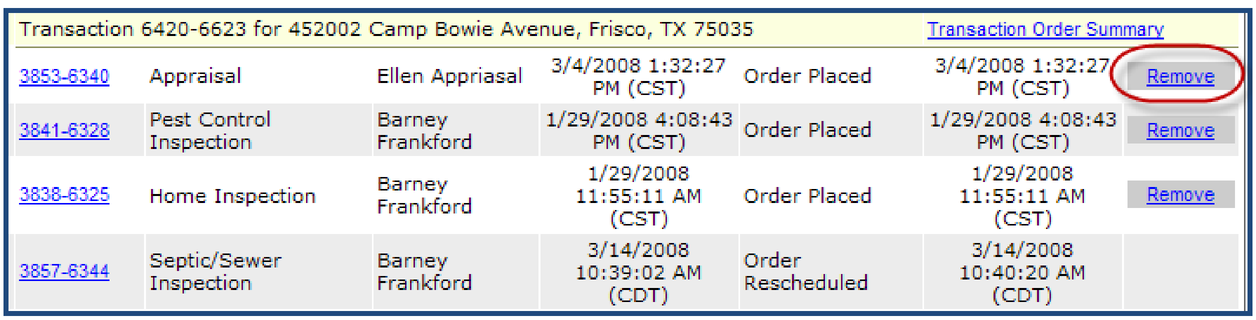
Use the **Order Center** to remove an order associated with a property when the order status is **Order Placed**.

1. Click the **Orders** tab.
2. Click **Existing Order Search**

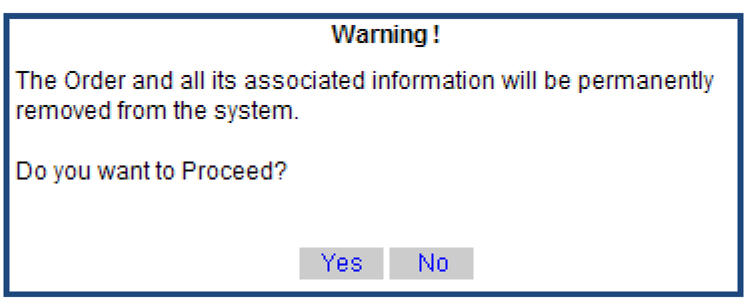
The **Order Center** page appears.



3. Click **Remove** to the right of the order to be removed. You can remove an order if the status of the order is **Order Placed.**



4. A warning page appears.

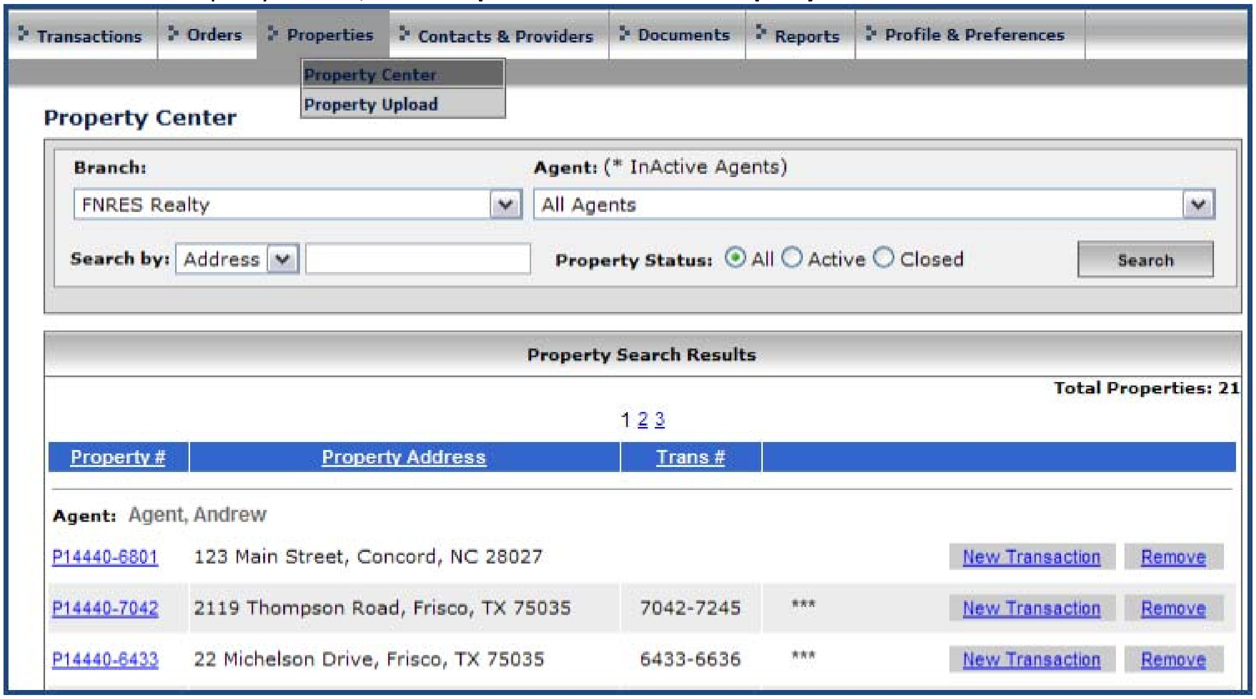


5. Click **Yes** to confirm you wish to remove an order.

Property Center

The Property Center allows you to view Property Details, Create a New Transaction from existing property information ore Remove the Property Information.

To Access the Property Center, Click **Properties** and choose **Property Center.**



Finding Existing Properties

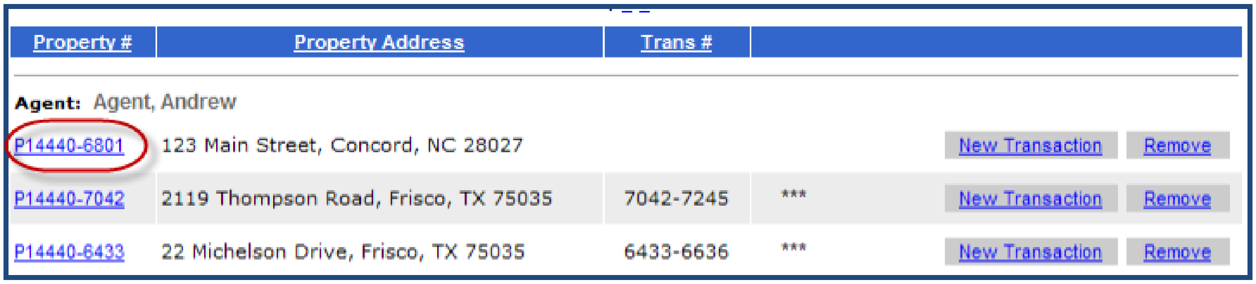
1. Click **Properties**, select **Property Center**
2. Select the **Branch**. If you are the coordinator for a single branch, only your active branch is listed.
3. Select the **Agent**. The page refreshes to show the properties associated with the selected agent.
4. Click **Search.**

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

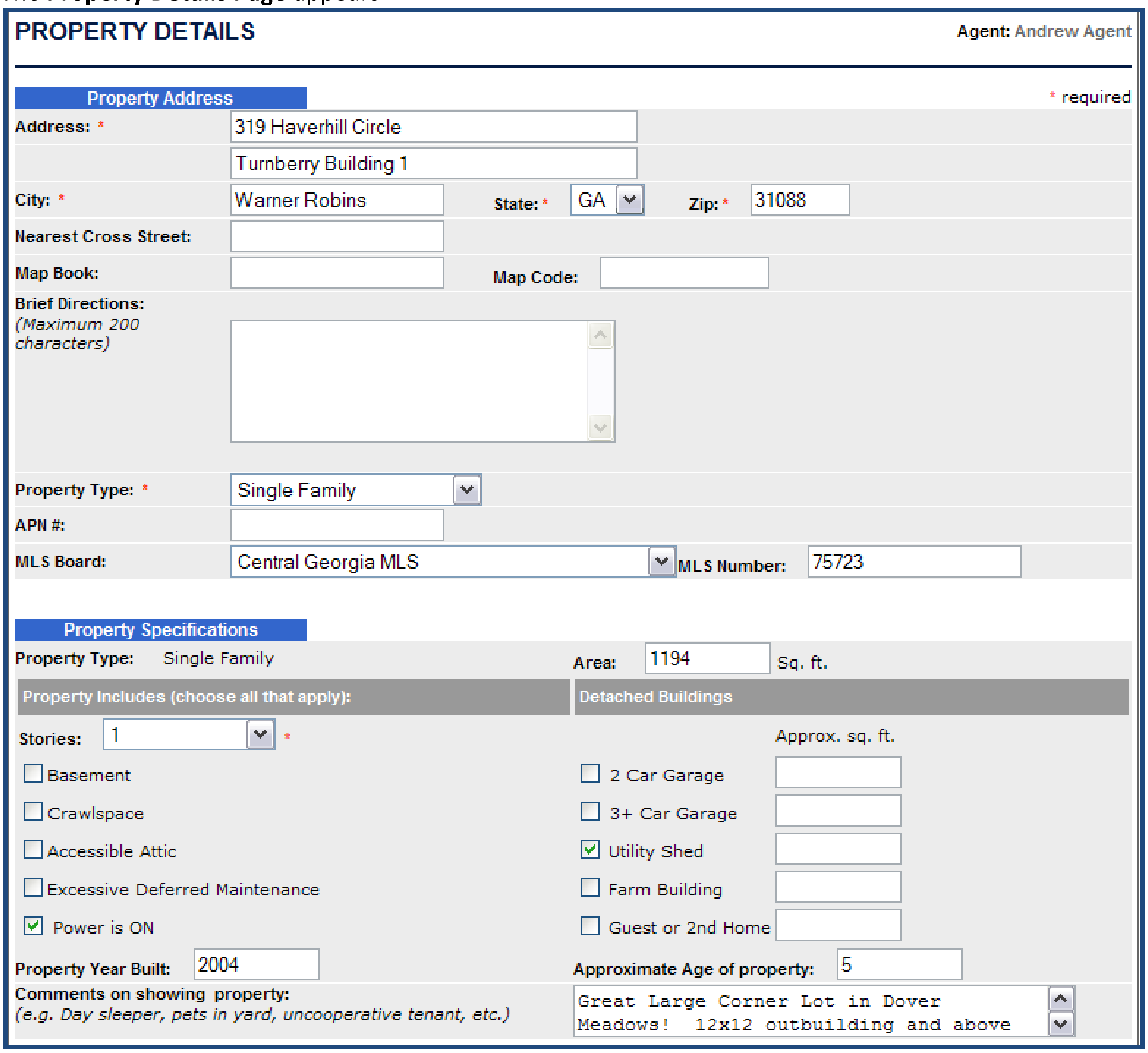
Note: If there are more than 10 properties associated with the agent, click **Next** to view the next page of properties.

Property Details

To view/modify property details such as address, square footage, specifications, etc., Click the **Property ID**.



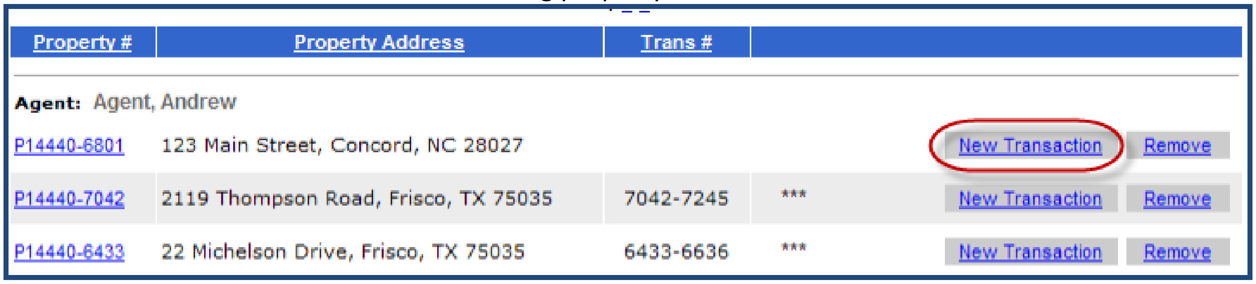
The **Property Details Page** appears



Note: Changes made to the property details will affect all existing transactions within the application.

Creating a New Transaction with existing property Information

You can create a transaction based off existing property information. Click **New Transaction**.



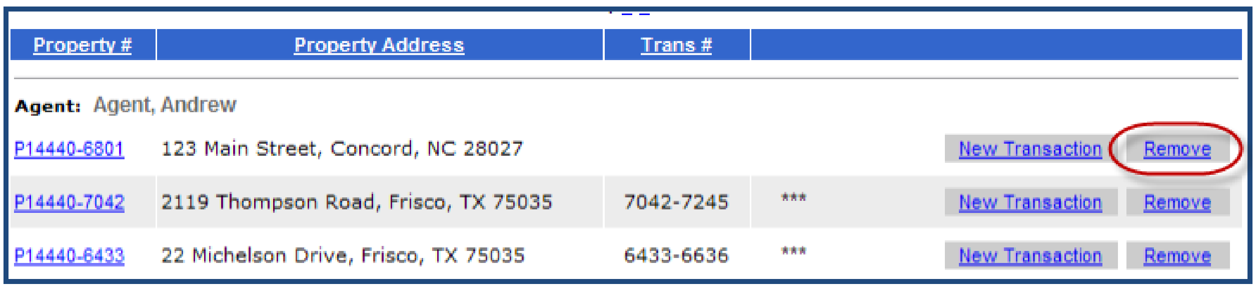
You will be brought to the **Create Transaction** screen. *See the **Creating a Transaction** portion of this guide for more details.*

Note: Using this feature will auto-populate a transaction with information specific to the address you selected.

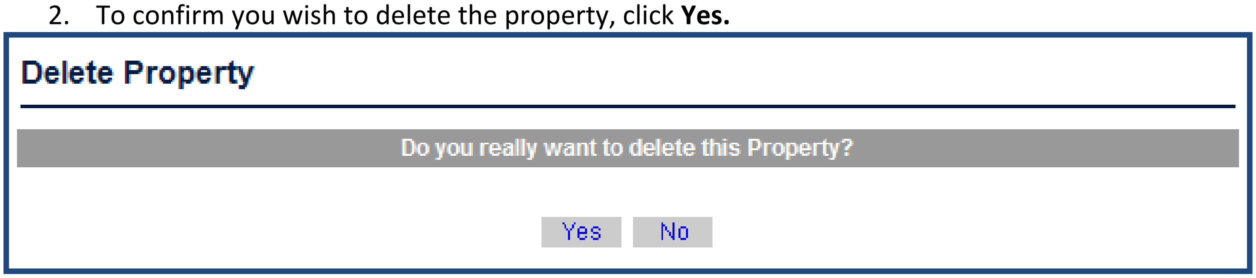
Removing Property

You can remove a property from TransactionPoint. Properties can be removed if there are no Orders or transactions associated with the property.

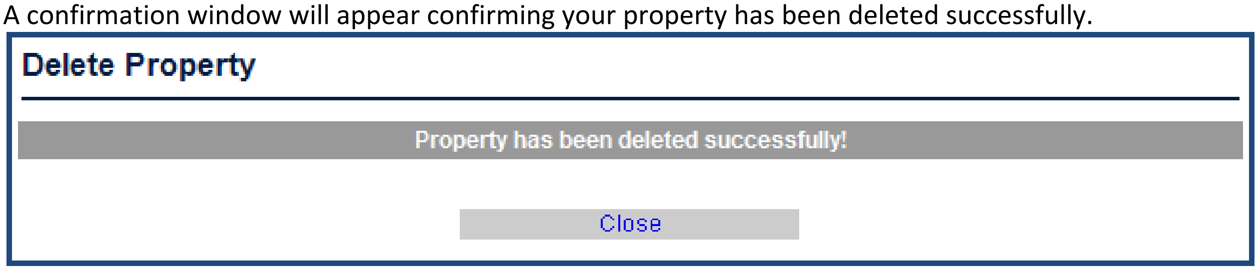
1. Click **Remove**



2. To confirm you wish to delete the property, click **Yes.**



A confirmation window will appear confirming your property has been deleted successfully.



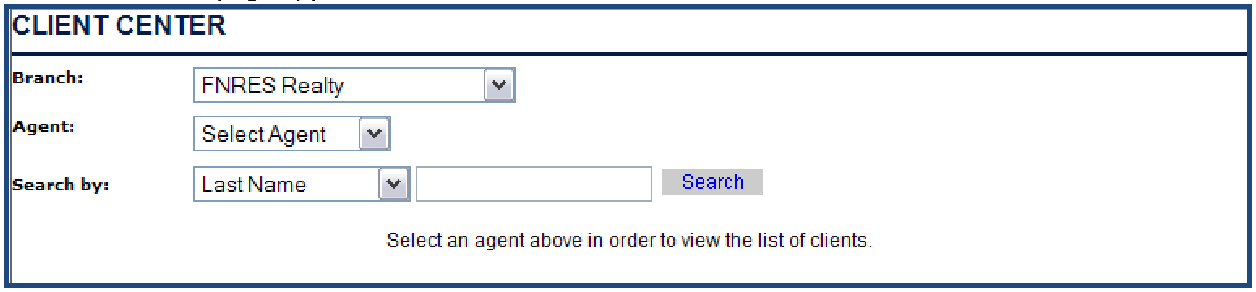
Contacts and Providers

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. Choose **Contacts Search**.

The **Client Center** page appears.

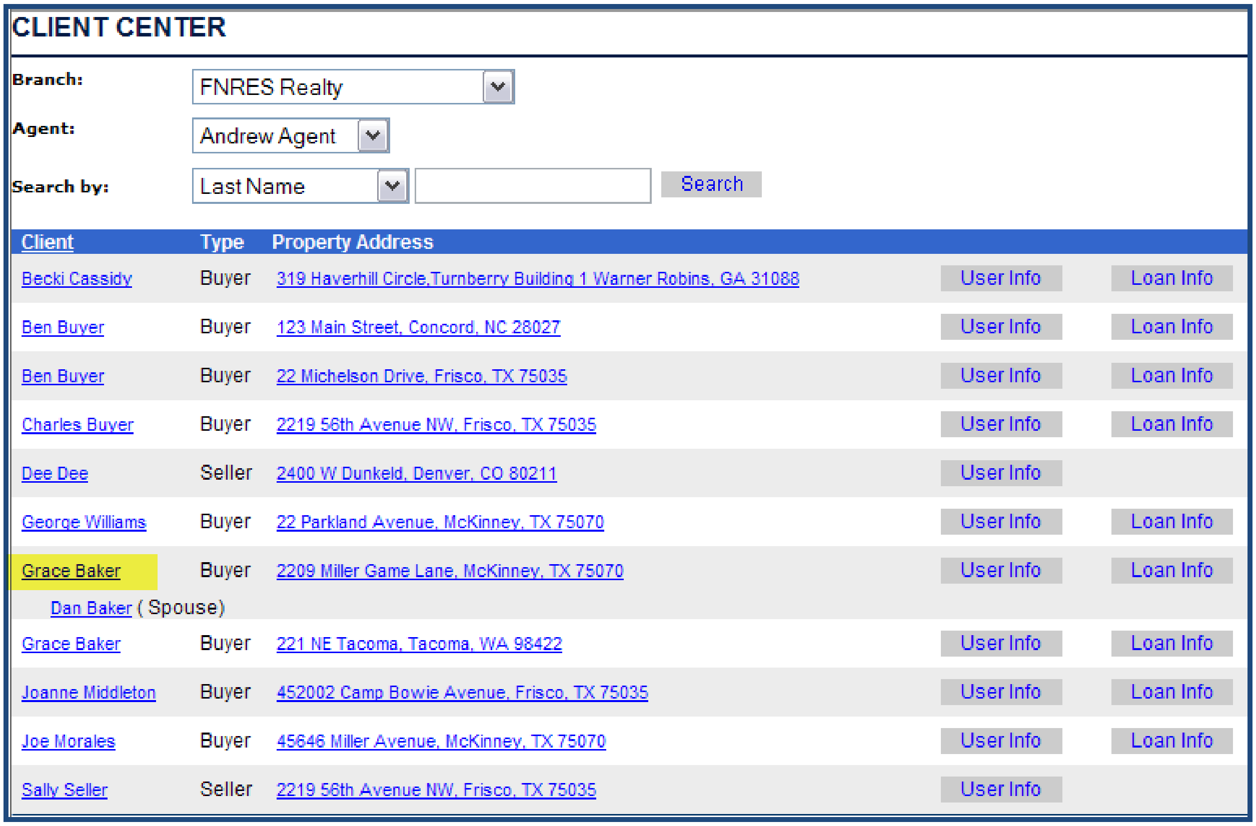


2. Select the **Branch**.
3. Select the **Agent**. The **Client Center** page refreshes to show the clients associated with the selected agent.
4. Click the **Search By** arrow to select a search option (**First Name**, **Last Name**, or **Property Address**.)
   Note: Type at least two characters of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

Client	Type	Property Address		
Becki Cassidy	Buyer	319 Haverhill Circle,Turnberry Building 1 Warner Robins, GA 31088	User Info	Loan Info
Ben Buyer	Buyer	123 Main Street, Concord, NC 28027	User Info	Loan Info
Ben Buyer	Buyer	22 Michelson Drive, Frisco, TX 75035	User Info	Loan Info
Charles Buyer	Buyer	2219 56th Avenue NW, Frisco, TX 75035	User Info	Loan Info
Dee Dee	Seller	2400 W Dunkeld, Denver, CO 80211	User Info	
George Williams	Buyer	22 Parkland Avenue, McKinney, TX 75070	User Info	Loan Info
Grace Baker Dan Baker (Spouse)	Buyer	2209 Miller Game Lane, McKinney, TX 75070	User Info	Loan Info
Grace Baker	Buyer	221 NE Tacoma, Tacoma, WA 98422	User Info	Loan Info
Joanne Middleton	Buyer	452002 Camp Bowie Avenue, Frisco, TX 75035	User Info	Loan Info
Joe Morales	Buyer	45646 Miller Avenue, McKinney, TX 75070	User Info	Loan Info
Sally Seller	Seller	2219 56th Avenue NW, Frisco, TX 75035	User Info	

Updating Client Information

1. Click the client name.



CLIENT CENTER

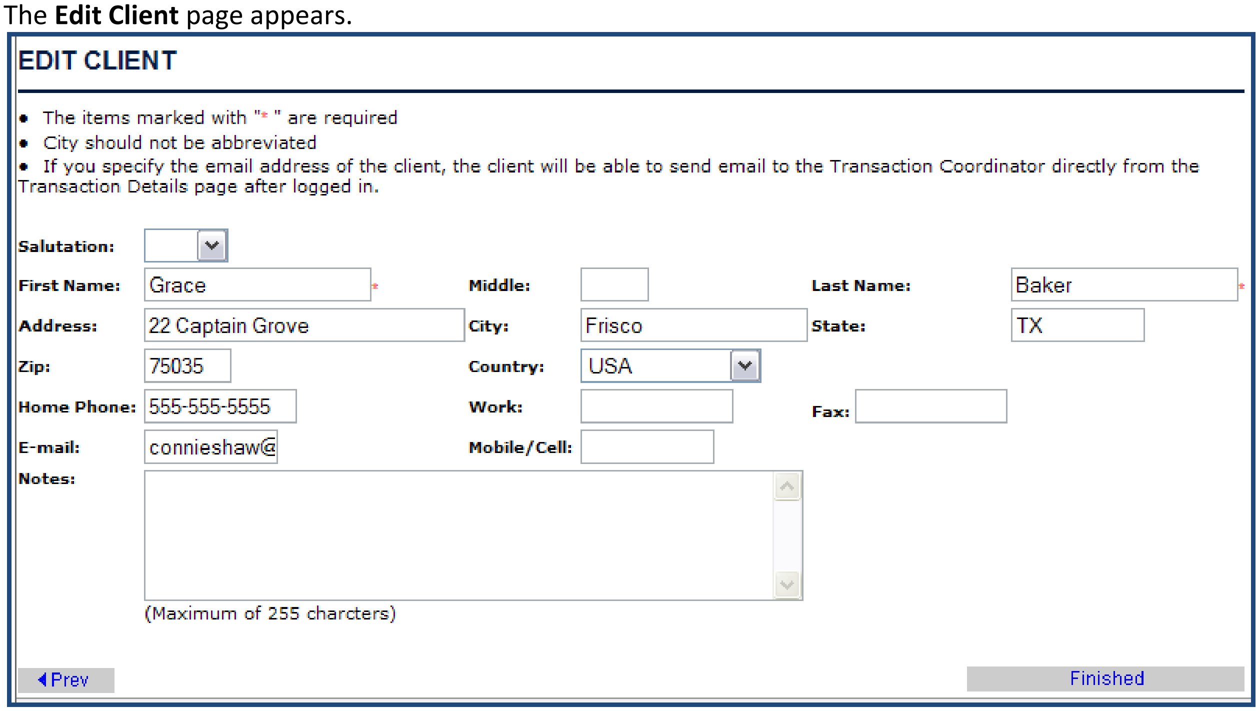
Branch: FNRES Realty

Agent: Andrew Agent

Search by: Last Name | Search

Client	Type	Property Address		
Becki Cassidy	Buyer	319 Haverhill Circle,Turnberry Building 1 Warner Robins, GA 31088	User Info	Loan Info
Ben Buyer	Buyer	123 Main Street, Concord, NC 28027	User Info	Loan Info
Ben Buyer	Buyer	22 Michelson Drive, Frisco, TX 75035	User Info	Loan Info
Charles Buyer	Buyer	2219 56th Avenue NW, Frisco, TX 75035	User Info	Loan Info
Dee Dee	Seller	2400 W Dunkeld, Denver, CO 80211	User Info	
George Williams	Buyer	22 Parkland Avenue, McKinney, TX 75070	User Info	Loan Info
Grace Baker Dan Baker (Spouse)	Buyer	2209 Miller Game Lane, McKinney, TX 75070	User Info	Loan Info
Grace Baker	Buyer	221 NE Tacoma, Tacoma, WA 98422	User Info	Loan Info
Joanne Middleton	Buyer	452002 Camp Bowie Avenue, Frisco, TX 75035	User Info	Loan Info
Joe Morales	Buyer	45646 Miller Avenue, McKinney, TX 75070	User Info	Loan Info
Sally Seller	Seller	2219 56th Avenue NW, Frisco, TX 75035	User Info	

The **Edit Client** page appears.



EDIT CLIENT

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

Salutation:

First Name: Grace * Middle: Last Name: Baker *

Address: 22 Captain Grove City: Frisco State: TX

Zip: 75035 Country: USA

Home Phone: 555-555-5555 Work: Fax:

E-mail: connieshaw@ Mobile/Cell:

Notes:

(Maximum of 255 charcters)

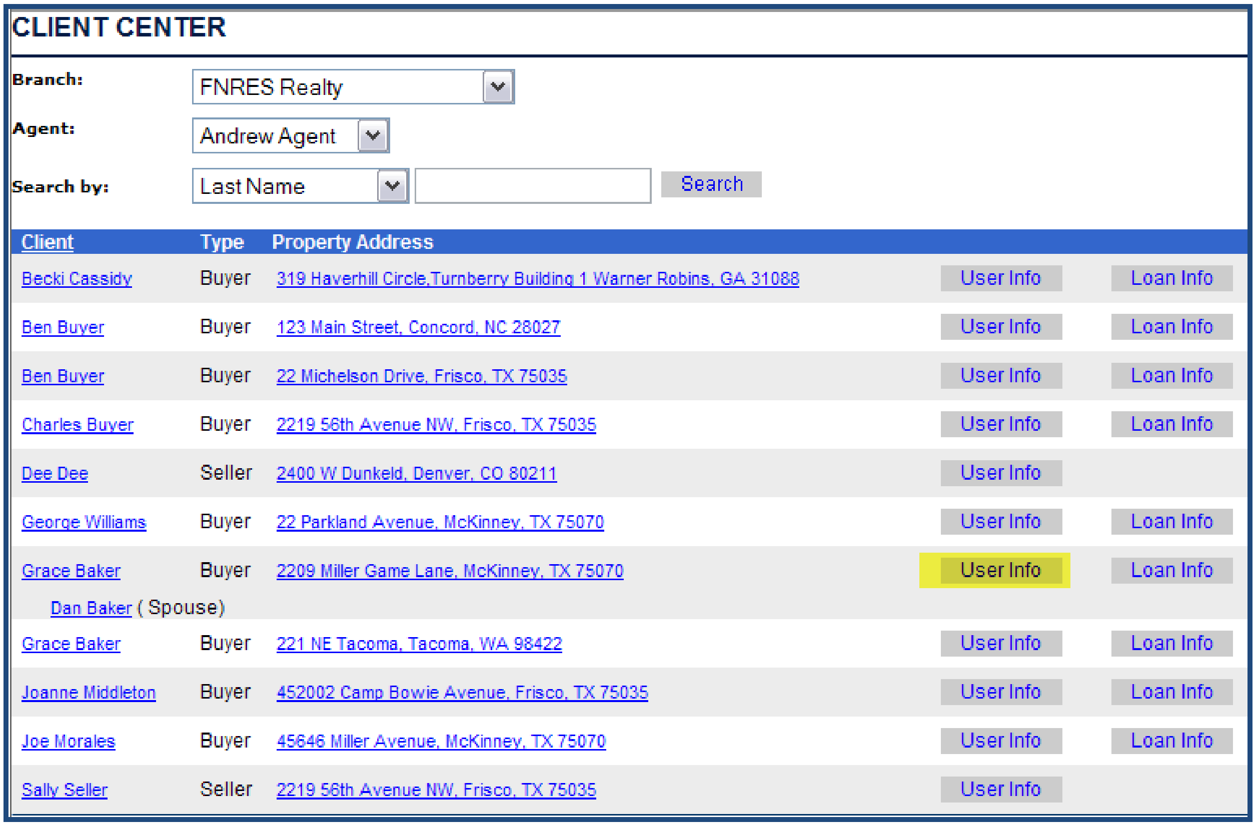
◂Prev Finished

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

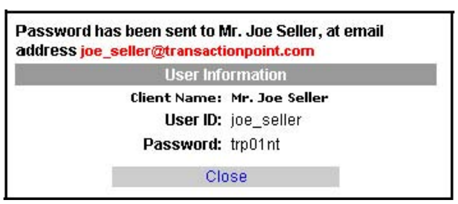
Note: Changes made to the profile affect all transactions in which the user exists.

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.

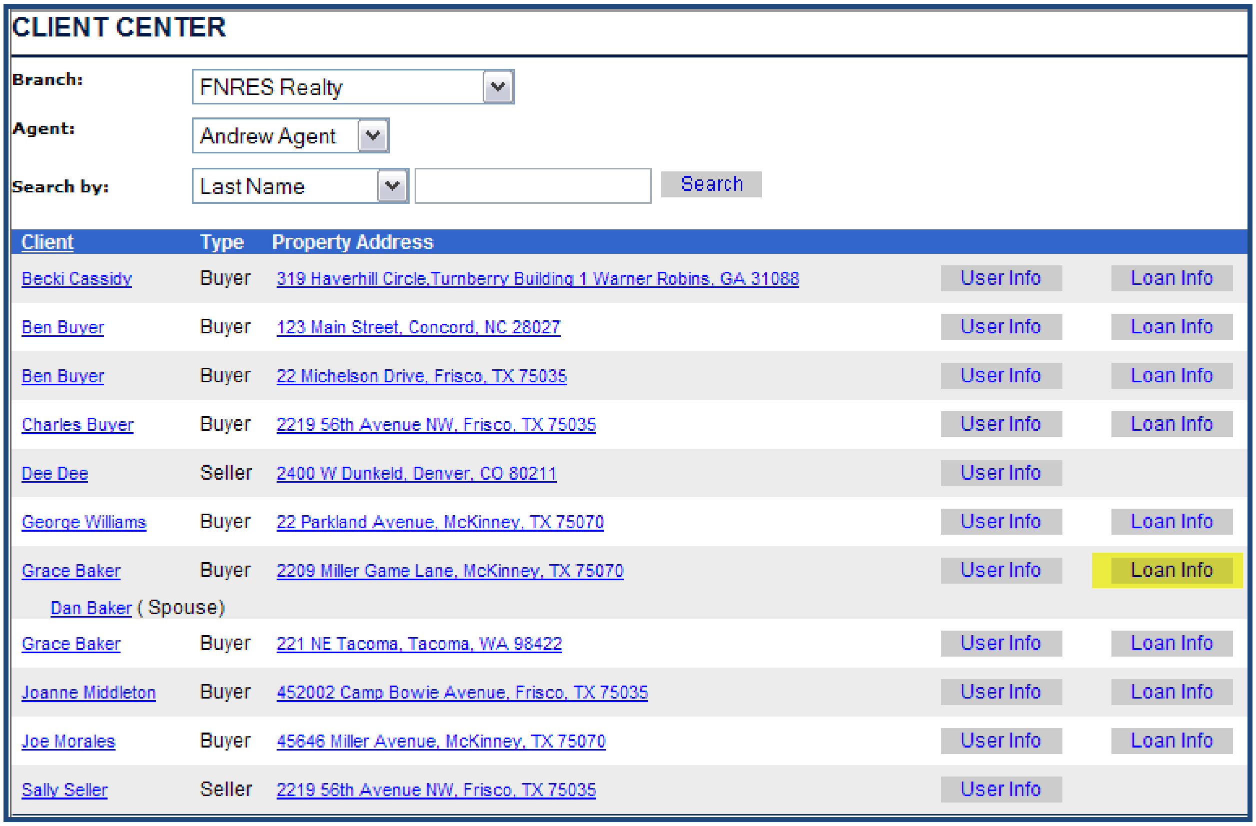


Note: Clicking the client link multiple times causes multiple messages to be sent to the client with their user ID and Password.

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.



CLIENT CENTER

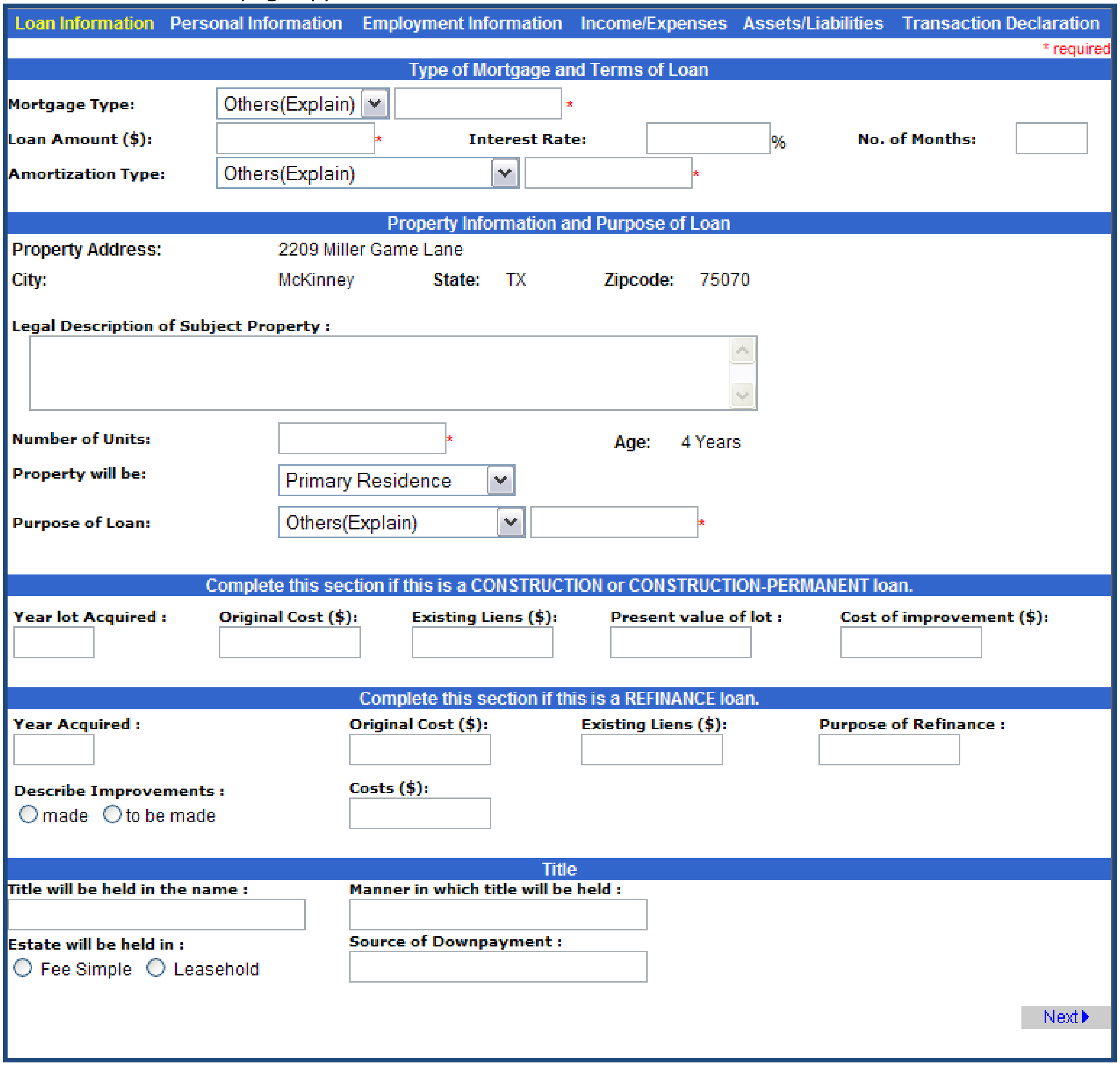
Branch: FNRES Realty

Agent: Andrew Agent

Search by: Last Name | Search

Client	Type	Property Address		
Becki Cassidy	Buyer	319 Haverhill Circle,Turnberry Building 1 Warner Robins, GA 31088	User Info	Loan Info
Ben Buyer	Buyer	123 Main Street, Concord, NC 28027	User Info	Loan Info
Ben Buyer	Buyer	22 Michelson Drive, Frisco, TX 75035	User Info	Loan Info
Charles Buyer	Buyer	2219 56th Avenue NW, Frisco, TX 75035	User Info	Loan Info
Dee Dee	Seller	2400 W Dunkeld, Denver, CO 80211	User Info	
George Williams	Buyer	22 Parkland Avenue, McKinney, TX 75070	User Info	Loan Info
Grace Baker	Buyer	2209 Miller Game Lane, McKinney, TX 75070	User Info	Loan Info
Dan Baker (Spouse)				
Grace Baker	Buyer	221 NE Tacoma, Tacoma, WA 98422	User Info	Loan Info
Joanne Middleton	Buyer	452002 Camp Bowie Avenue, Frisco, TX 75035	User Info	Loan Info
Joe Morales	Buyer	45646 Miller Avenue, McKinney, TX 75070	User Info	Loan Info
Sally Seller	Seller	2219 56th Avenue NW, Frisco, TX 75035	User Info	

The **Loan Information** page appears



Loan Information | Personal Information | Employment Information | Income/Expenses | Assets/Liabilities | Transaction Declaration

* required

Type of Mortgage and Terms of Loan

Mortgage Type: Others(Explain) *

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

Amortization Type: Others(Explain) *

Property Information and Purpose of Loan

Property Address: 2209 Miller Game Lane

City: McKinney State: TX Zipcode: 75070

Legal Description of Subject Property :

Number of Units: * Age: 4 Years

Property will be: Primary Residence

Purpose of Loan: Others(Explain) *

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

Year lot Acquired : | Original Cost ($): | Existing Liens ($): | Present value of lot : | Cost of improvement ($):

Complete this section if this is a REFINANCE loan.

Year Acquired : | Original Cost ($): | Existing Liens ($): | Purpose of Refinance :

Describe Improvements : made / to be made

Costs ($):

Title

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

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

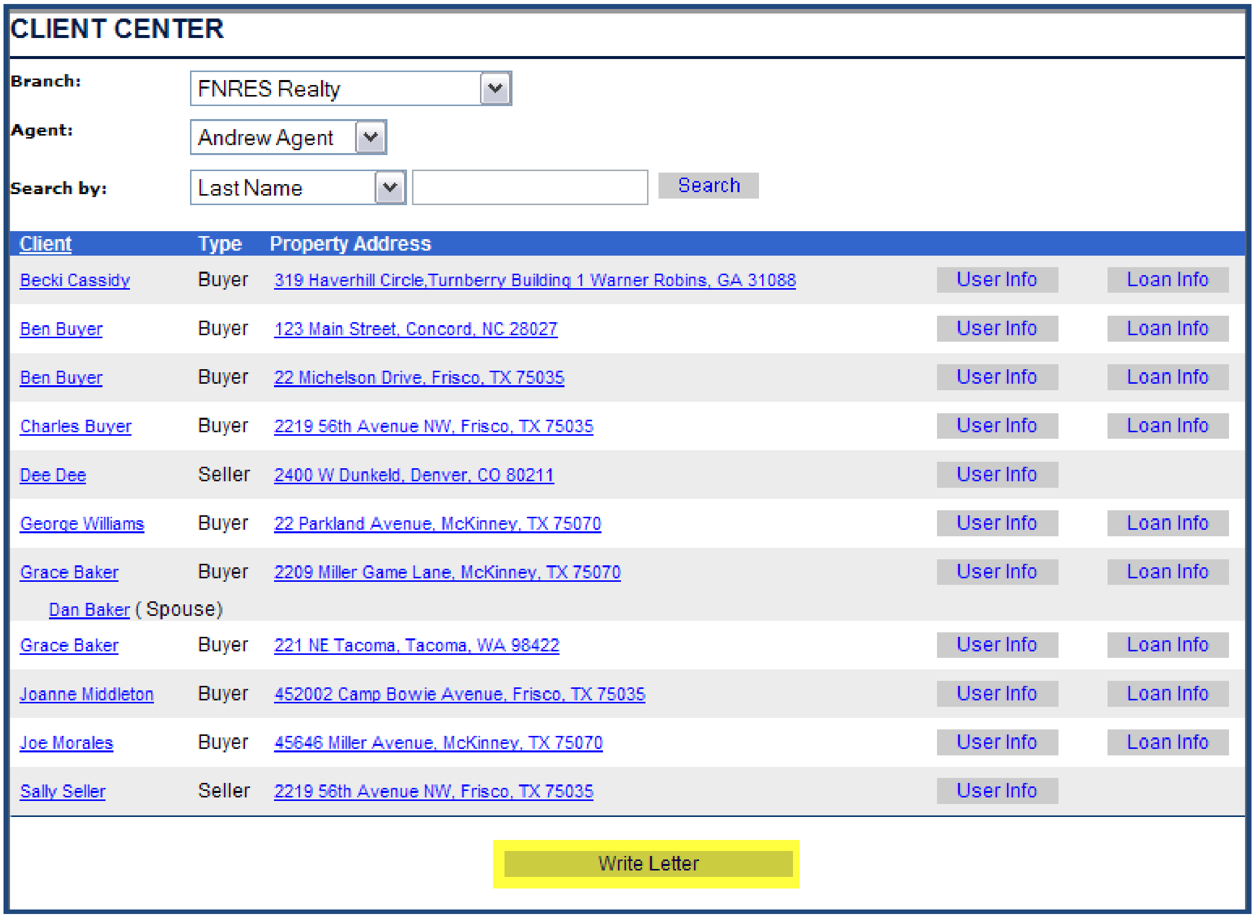
Next

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

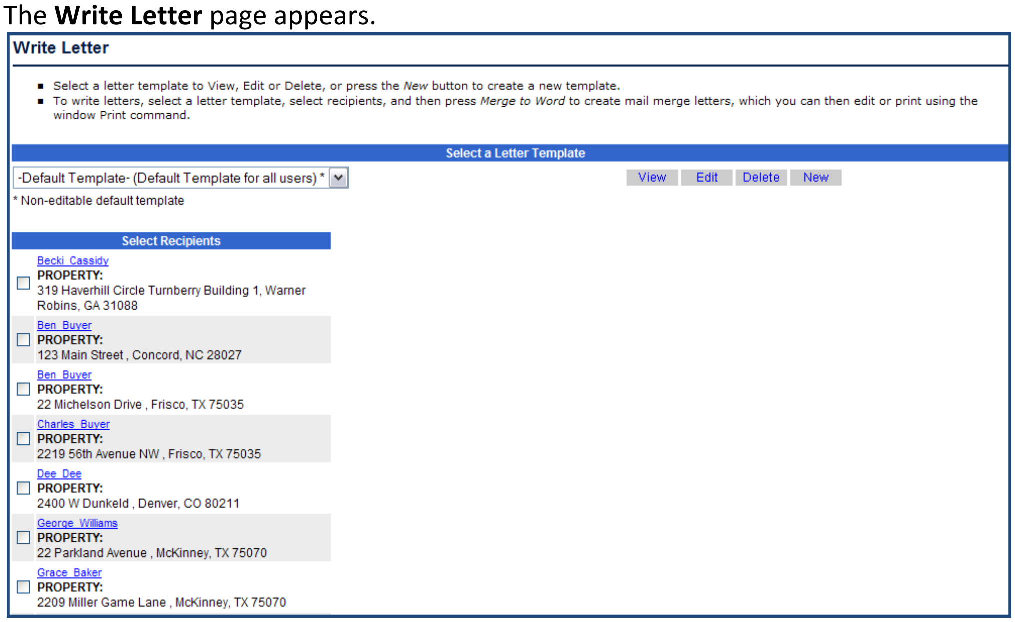
Writing a Client Letter(s)

You can use the **Client Center** to write a letter to the client. The Letter Writer feature is also accessible on the **Contacts** tab.

1. Click **Write Letter**.

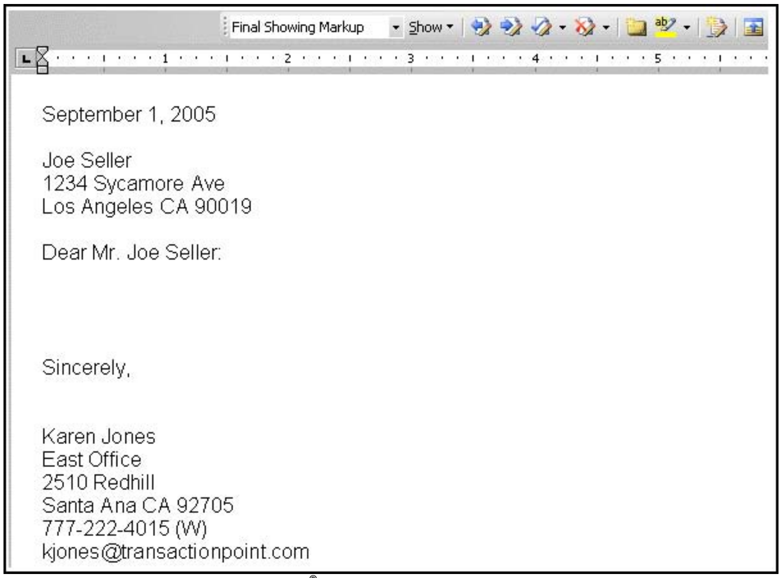


The **Write Letter** page appears.



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

2. Select a template for the letter from the **Default Template** pull-down.
3. Select the recipients.
4. Click **Merge to Word** at the bottom of the page. The Word format page appears. Note that the HTML formatting has been replaced.
5. Enter the body of the letter in the appropriate area, which is usually after the salutation. The letter automatically expands as you type; you are not restricted to the space initially provided.



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

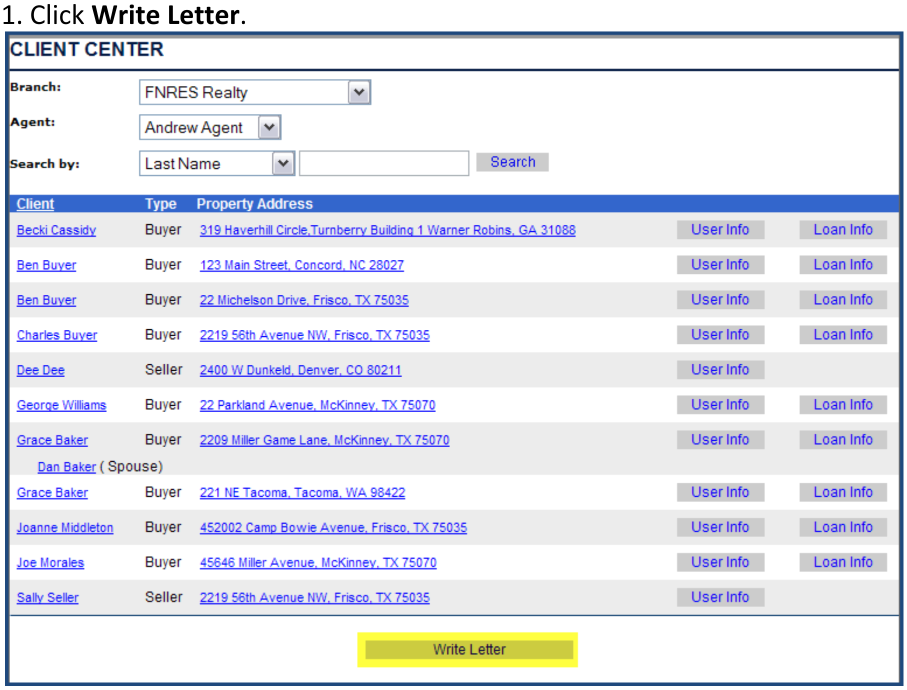
Using Letter Templates

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

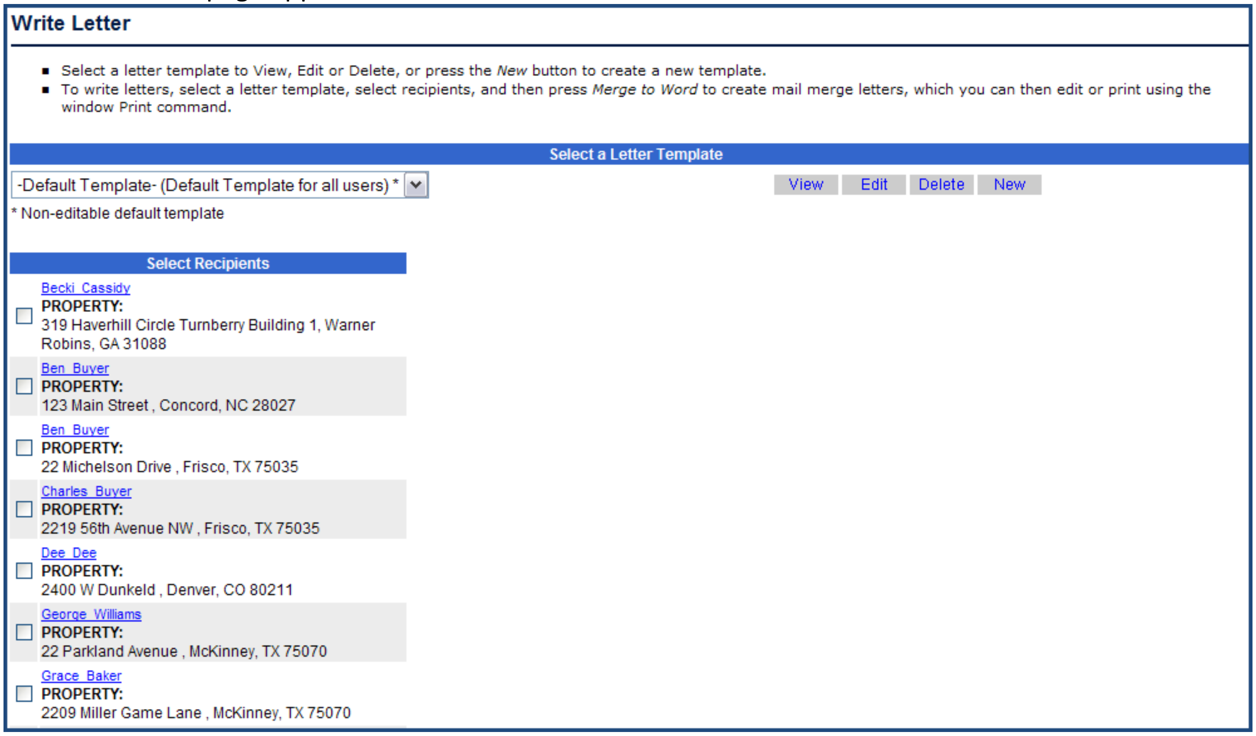
Creating a Template

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

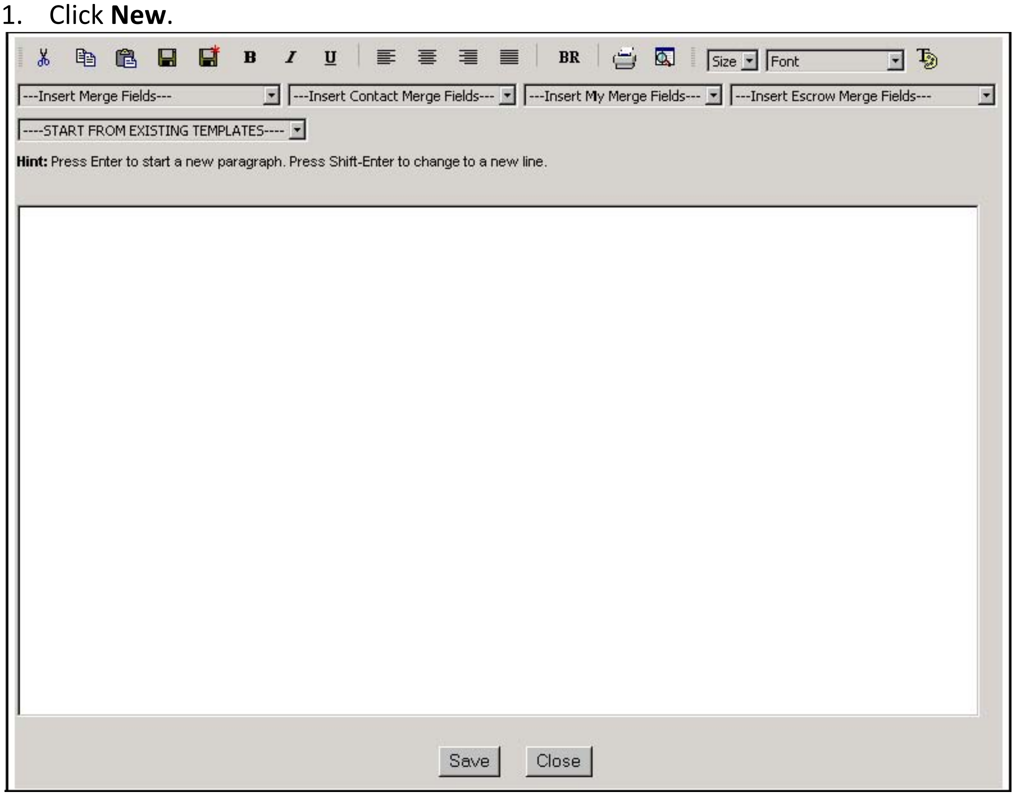
1. Click **Write Letter**.



The **Write Letter** page appears.



1. Click **New**.

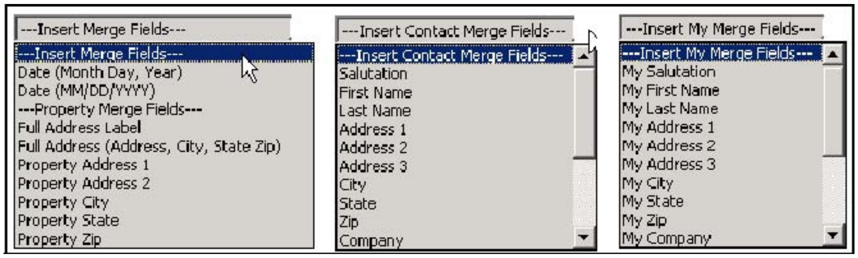


2. Use the pull-down menus to create the template.
    a. **Insert Merge Fields**: Date information and all information regarding the location of the property.
    b. **Insert Contact Merge Fields**: All information regarding the client which includes their first name, last name, address, phone, etc.
    c. **Insert My Fields**: All information regarding the TC or the full-access Agent in charge of

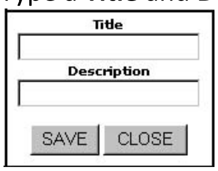
the transaction. This information would include first name, last name, company name, phone number, etc.

d. **Start From Existing Templates:** Allows you to base the new template on an existing template.

e. 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.

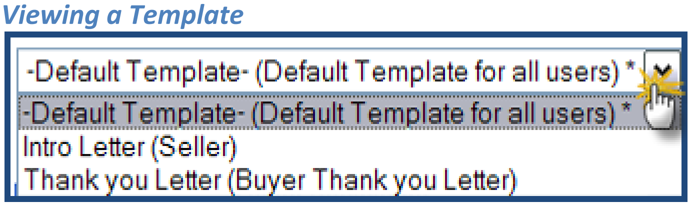


3. Click **Save**. A page appears for you to provide a name for the new template.
4. Type a **Title** and **Description** for the new template.



5. Click **Save**.
6. Click **Close**.
7. Click the **Default Template** arrow to see the newly created template in the list.

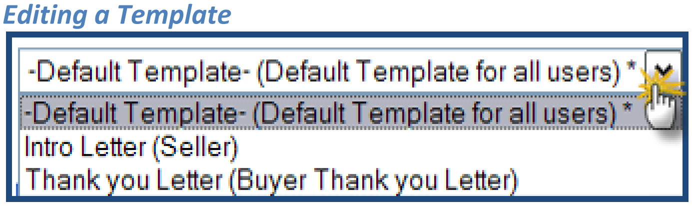
Viewing a Template



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

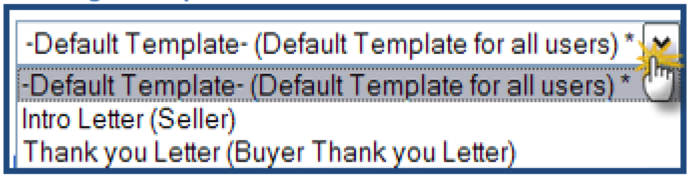
Note: You cannot make any changes to the template since it is open for read-only viewing.

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

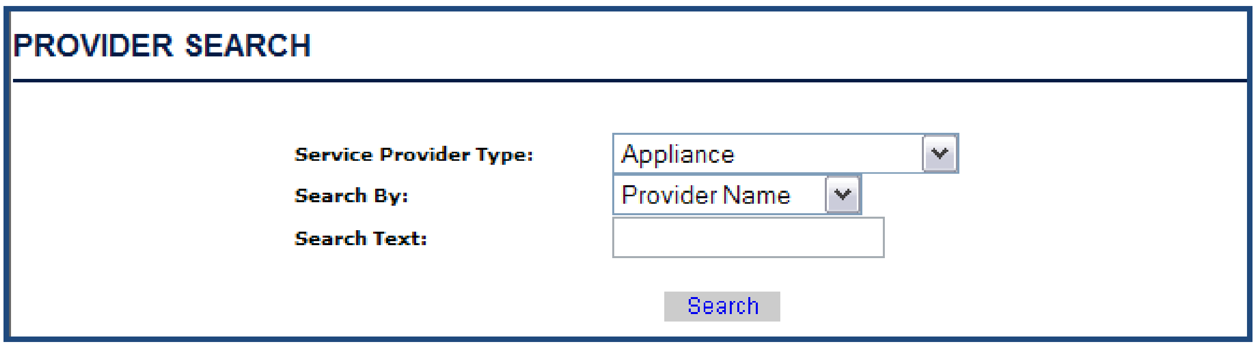


1. Select the template from the pull-down list.
2. Click **Delete**. A delete confirmation page appears.
3. Click **OK** to confirm the deletion of the selected template. The **Write Letter** page refreshes and the list of available templates is updated.

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. Choose **Providers Search**.



1. Select the **Provider Type**.
2. Select the **Search By** option.
3. Type at least two characters of the **Search text.**
4. Click **Search**

The **Search Results** page appears

Search Results		
Provider Branch Name	Company	Address
Barney Frankford	Bugs R Us Plus	4218 Miller Avenue, McKinney, TX, 75070

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

Document Center

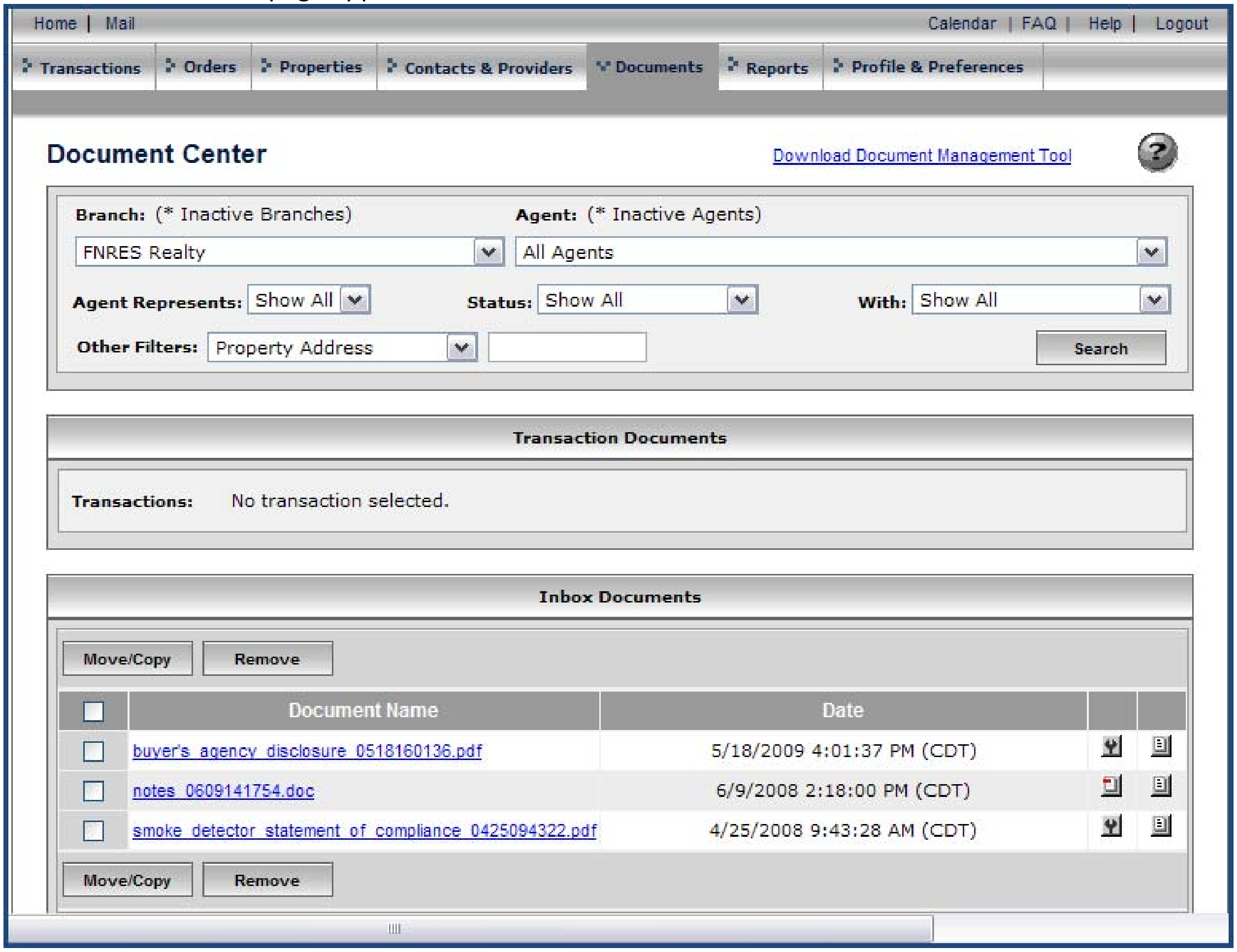
You can receive fax or e-mail documents, print documents to TransactionPoint, or upload documents located on your computer.

Note: The documents you upload must have a file type of .doc, .docx, .txt, .pdf, .tif, .dot, .rtf, .xls, .xlsx, .ppt, .mpp, .jpg, .pub, .gif.
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 http://www.adobe.com/.

Viewing Documents

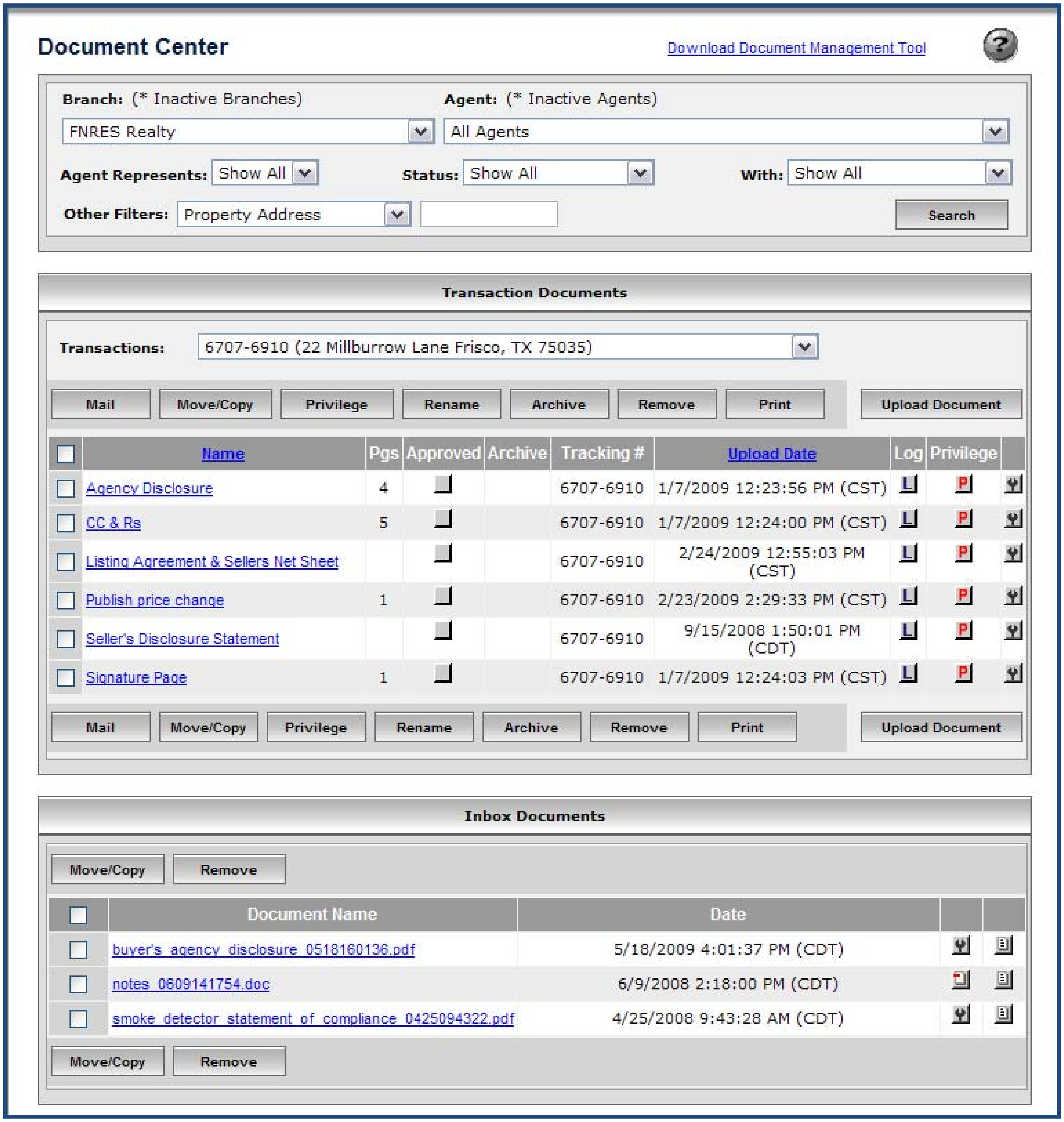
1. Click **Documents** in the main navigational toolbar.

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**.
4. In the **Transaction** list, select a transaction.

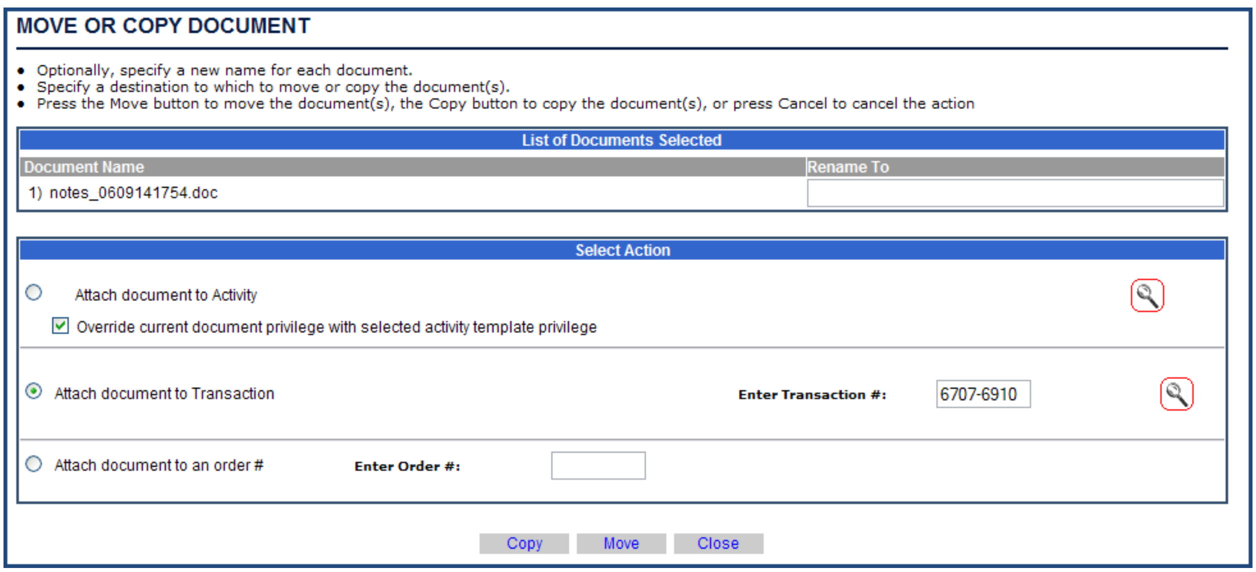
The **Document Center** page refreshes to show the transaction and any documents associated with that transaction.



Moving Inbox Documents

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

3. Select whether you want to associate the document with an activity, a transaction number, or an order number.
   a. 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**.
   b. If you select transaction or order, enter the transaction or order number or click the **Search** icon to search for the transaction.



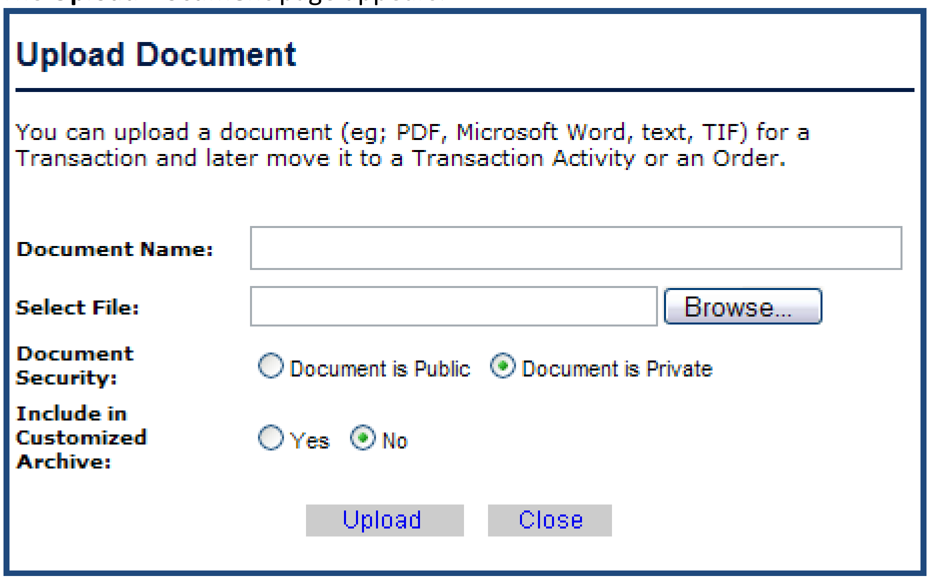
Optional: specify a new name for each document.

4. Once you have selected your destination for the document, click **Move** to move the document, select **Copy** to copy the document or press **Cancel** to cancel the action.
5. A confirmation page will display confirming your action.

Uploading Documents from the Document Center

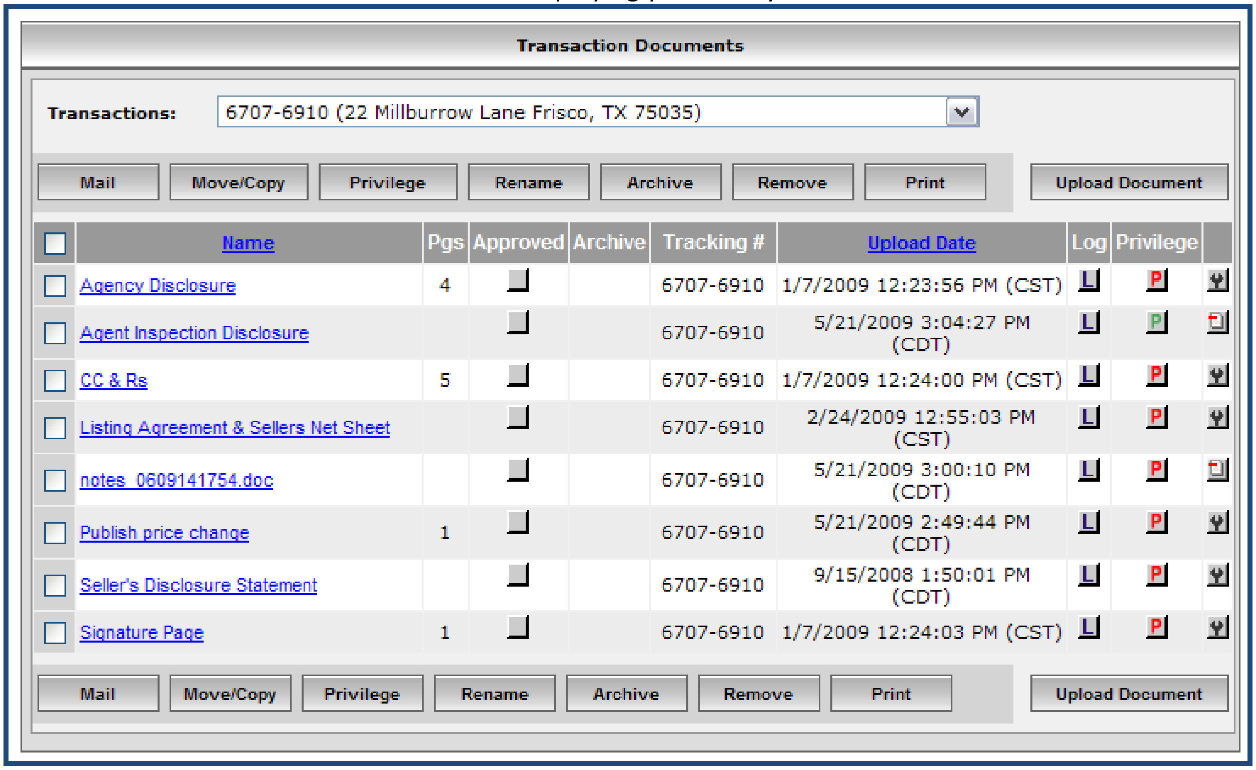
1. Click **Documents** in the main navigational toolbar.
2. Select from one or more of the following lists to locate a transaction.
   - Branch
   - Agent
   - Agent representation
   - Status (transaction status)
   - With (activity status)
   - Other filters (with text box for additional filtering)
3. Click **Search**.
4. In the **Transaction** list, select a 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. Click **Upload**

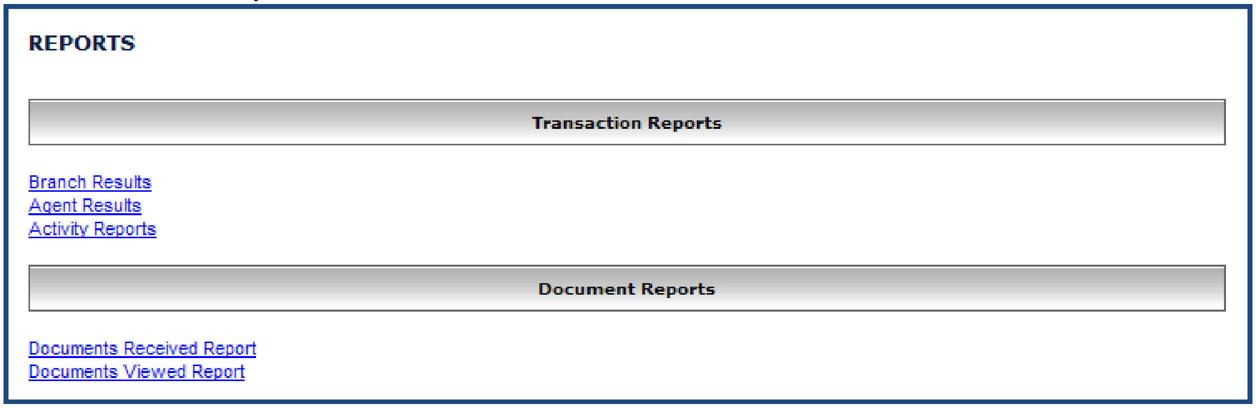
The Transaction Documents list will refresh displaying your newly added document.



	Name	Pgs	Approved	Archive	Tracking #	Upload Date	Log	Privilege	
	Agency Disclosure	4			6707-6910	1/7/2009 12:23:56 PM (CST)			
	Agent Inspection Disclosure				6707-6910	5/21/2009 3:04:27 PM (CDT)			
	CC & Rs	5			6707-6910	1/7/2009 12:24:00 PM (CST)			
	Listing Agreement & Sellers Net Sheet				6707-6910	2/24/2009 12:55:03 PM (CST)			
	notes_0609141754.doc				6707-6910	5/21/2009 3:00:10 PM (CDT)			
	Publish price change	1			6707-6910	5/21/2009 2:49:44 PM (CDT)			
	Seller's Disclosure Statement				6707-6910	9/15/2008 1:50:01 PM (CDT)			
	Signature Page	1			6707-6910	1/7/2009 12:24:03 PM (CST)			

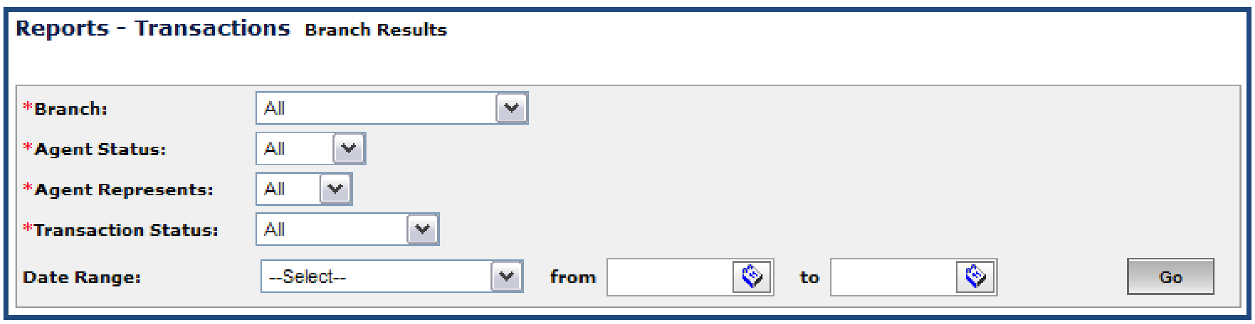
Report Center

The **Reports** tab located in the main navigational toolbar allows you to run **Transaction Reports** as well as **Document Reports**.

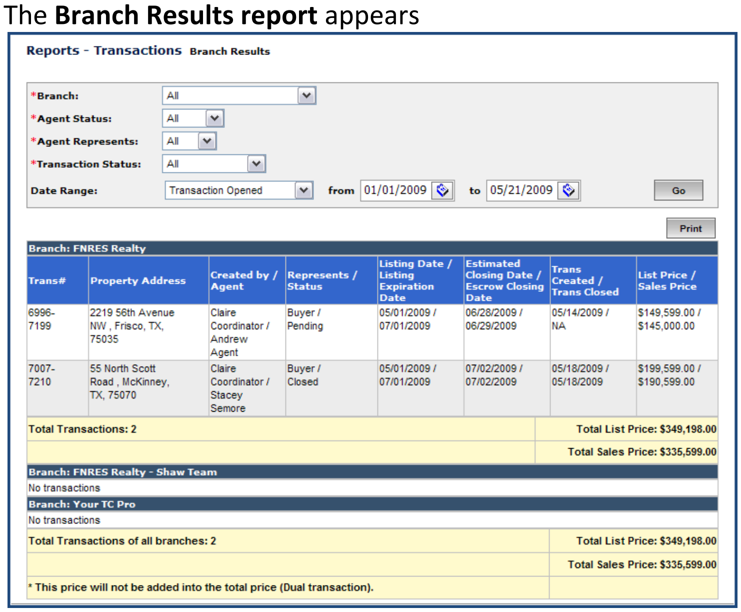


Creating a Branch Results Report

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 Results report** appears



Branch: FNRES Realty

Trans#	Property Address	Created by / Agent	Represents / Status	Listing Date / Listing Expiration Date	Estimated Closing Date / Escrow Closing Date	Trans Created / Trans Closed	List Price / Sales Price
6996-7199	2219 56th Avenue NW , Frisco, TX, 75035	Claire Coordinator / Andrew Agent	Buyer / Pending	05/01/2009 / 07/01/2009	06/28/2009 / 06/29/2009	05/14/2009 / NA	$149,599.00 / $145,000.00
7007-7210	55 North Scott Road , McKinney, TX, 75070	Claire Coordinator / Stacey Semore	Buyer / Closed	05/01/2009 / 07/01/2009	07/02/2009 / 07/02/2009	05/18/2009 / 05/18/2009	$199,599.00 / $190,599.00
Total Transactions: 2							Total List Price: $349,198.00
							Total Sales Price: $335,599.00

Branch: FNRES Realty - Shaw Team

No transactions

Branch: Your TC Pro

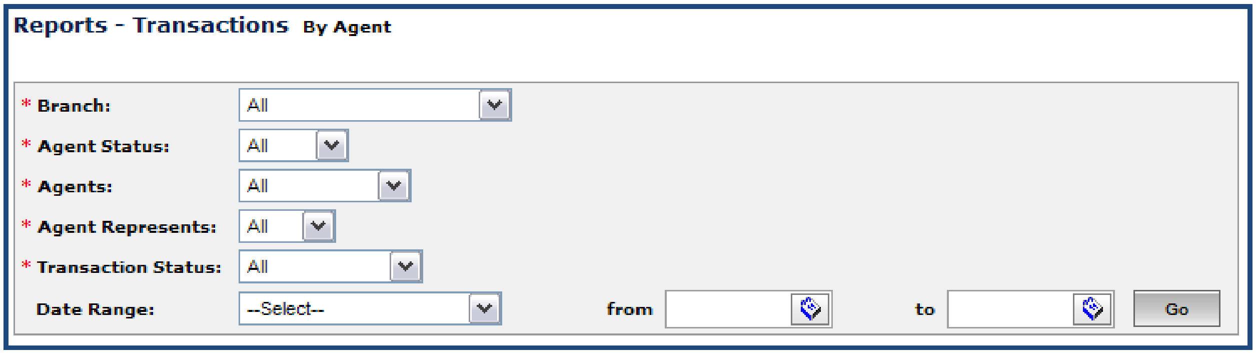
No transactions

Total Transactions of all branches: 2	Total List Price: $349,198.00
	Total Sales Price: $335,599.00
* This price will not be added into the total price (Dual transaction).	

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

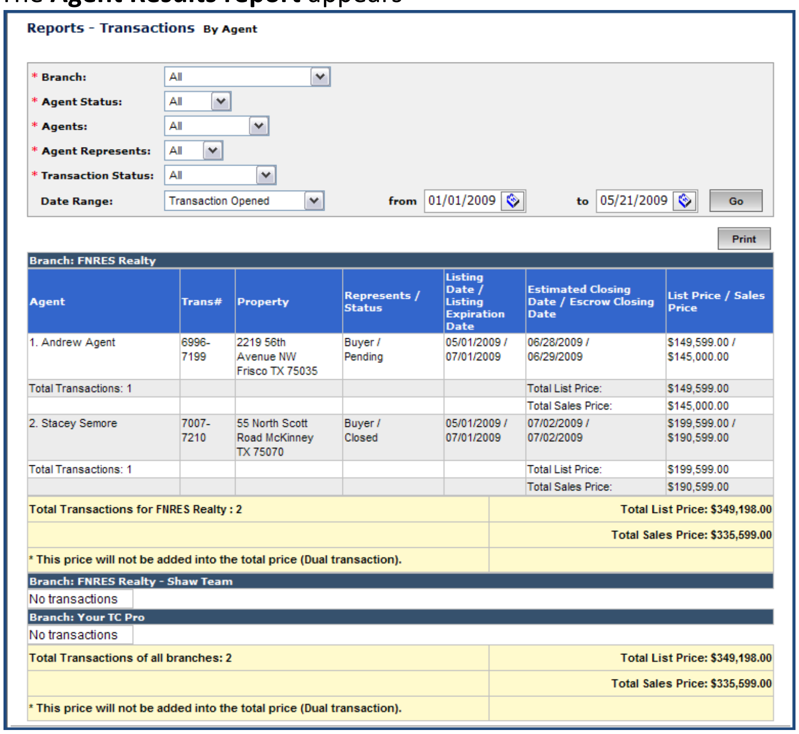
Creating an Agent Report

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



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

The **Agent Results report** appears



Branch: FNRES Realty

Agent	Trans#	Property	Represents / Status	Listing Date / Listing Expiration Date	Estimated Closing Date / Escrow Closing Date	List Price / Sales Price
1. Andrew Agent	6996-7199	2219 56th Avenue NW Frisco TX 75035	Buyer / Pending	05/01/2009 / 07/01/2009	06/28/2009 / 06/29/2009	$149,599.00 / $145,000.00
Total Transactions: 1					Total List Price:	$149,599.00
					Total Sales Price:	$145,000.00
2. Stacey Semore	7007-7210	55 North Scott Road McKinney TX 75070	Buyer / Closed	05/01/2009 / 07/01/2009	07/02/2009 / 07/02/2009	$199,599.00 / $190,599.00
Total Transactions: 1					Total List Price:	$199,599.00
					Total Sales Price:	$190,599.00

Total Transactions for FNRES Realty : 2 — Total List Price: $349,198.00

Total Sales Price: $335,599.00

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

Branch: FNRES Realty - Shaw Team

No transactions

Branch: Your TC Pro

No transactions

Total Transactions of all branches: 2 — Total List Price: $349,198.00

Total Sales Price: $335,599.00

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

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

Creating an Activity Report

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

Activity Report

Branch:	All
Agent Status:	All
Agent:	All
Agent Represents:	All
Transaction Status:	All
Activity Description:	
Activity Status:	Due/Past Due Between and Go

3. Select the **Branch**, **Agent Status**, **Agent**, **Agent Representation, Transaction Status**, (Optional: Activity description), **Activity Status** with corresponding **Date Range**.
4. Click **Go**

The **Activity Report** appears

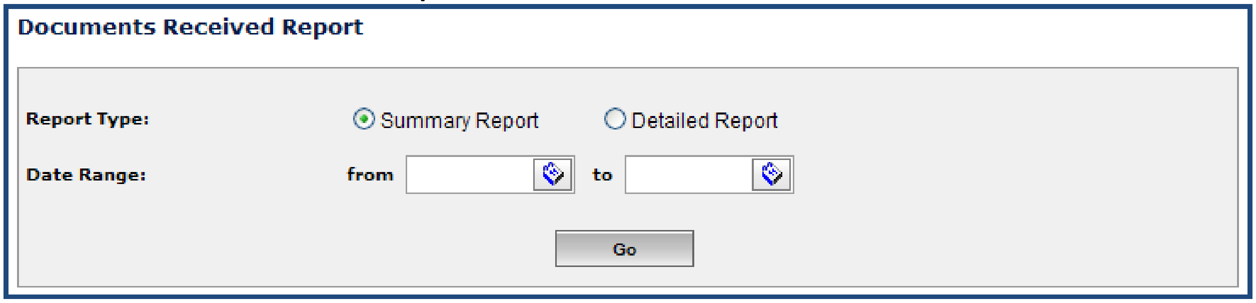
Print

Branch Name: FNRES Realty					
Coordinator: Claire Coordinator					
Trans #	**Represents Status**	**Listing Date Listing Expiration Date**	**Estimated Closing Date Escrow Closing Date**	**Due**	**Completed**
Agent: Andrew Agent					
6996-7199 for 2219 56th Avenue NW, Frisco, TX 75035	Buyer Pending	5/1/2009 7/1/2009	6/28/2009		
Earnest Money				5/14/2009	
5/14/2009 5:58:07 PM CDT, Claire Coordinator: Awaiting receipt from Title					
Home Inspection				5/15/2009	
Purchase Agreement				5/15/2009	
Termite inspection				5/15/2009	
Well and/or Septic Tank inspection				5/15/2009	
Appraisal				5/16/2009	
All inspection reports				5/21/2009	
Documents to Closing Company				5/21/2009	
Set up closing time				5/21/2009	

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

Creating a Documents Received Report

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


Documents Received Report

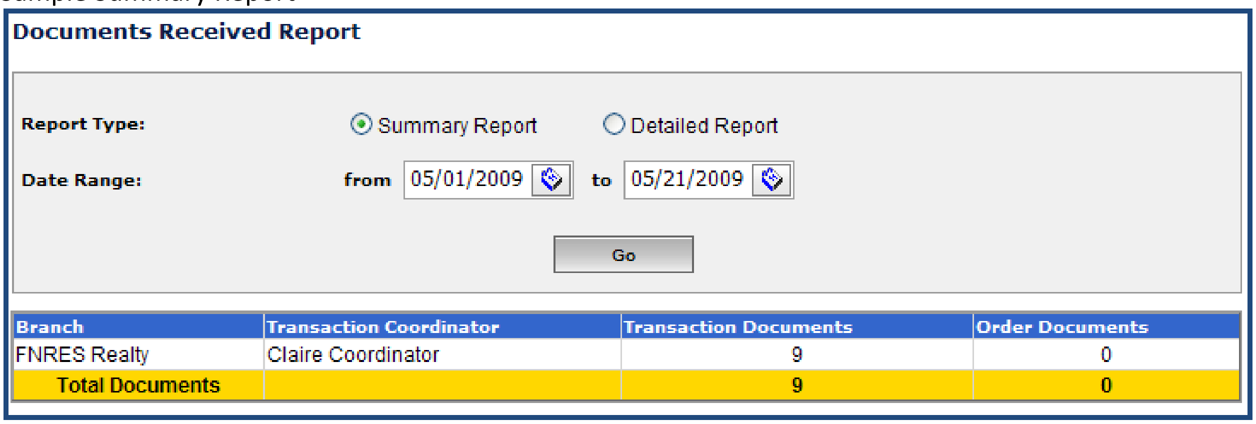
Report Type: Summary Report / Detailed Report

Date Range: from ___ to ___

Go

3. Select the **Report Type** (Summary or Detailed).
4. Enter the **Date Range**.
5. Click **Go**

Sample Summary Report


Documents Received Report

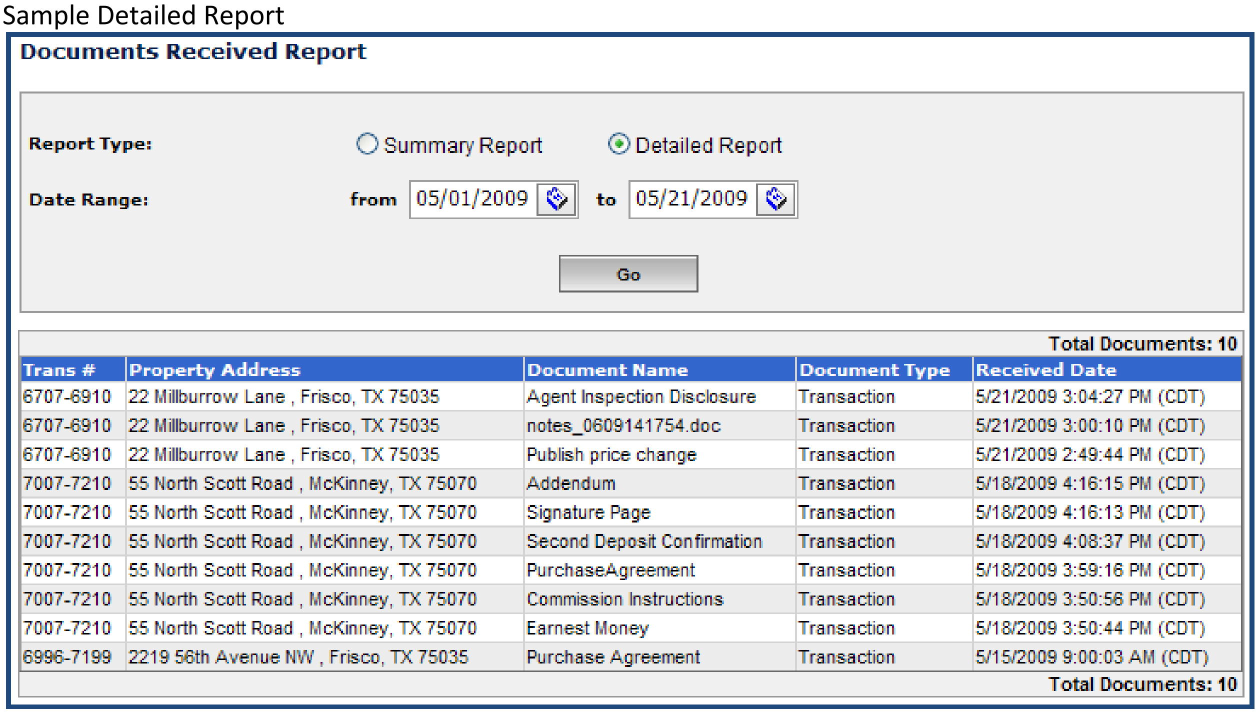
Report Type: Summary Report / Detailed Report

Date Range: from 05/01/2009 to 05/21/2009

Go

Branch	Transaction Coordinator	Transaction Documents	Order Documents
FNRES Realty	Claire Coordinator	9	0
Total Documents		9	0

Sample Detailed Report


Documents Received Report

Report Type: Summary Report / Detailed Report

Date Range: from 05/01/2009 to 05/21/2009

Go

Total Documents: 10

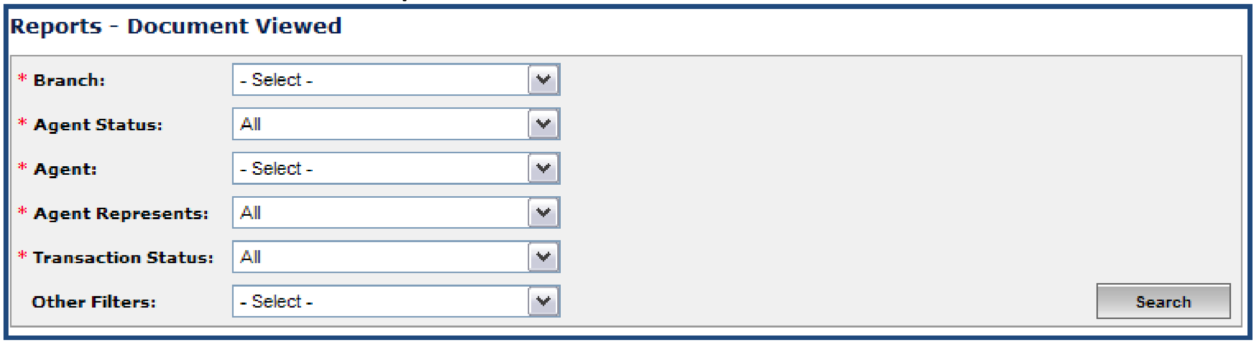
Trans #	Property Address	Document Name	Document Type	Received Date
6707-6910	22 Millburrow Lane , Frisco, TX 75035	Agent Inspection Disclosure	Transaction	5/21/2009 3:04:27 PM (CDT)
6707-6910	22 Millburrow Lane , Frisco, TX 75035	notes_0609141754.doc	Transaction	5/21/2009 3:00:10 PM (CDT)
6707-6910	22 Millburrow Lane , Frisco, TX 75035	Publish price change	Transaction	5/21/2009 2:49:44 PM (CDT)
7007-7210	55 North Scott Road , McKinney, TX 75070	Addendum	Transaction	5/18/2009 4:16:15 PM (CDT)
7007-7210	55 North Scott Road , McKinney, TX 75070	Signature Page	Transaction	5/18/2009 4:16:13 PM (CDT)
7007-7210	55 North Scott Road , McKinney, TX 75070	Second Deposit Confirmation	Transaction	5/18/2009 4:08:37 PM (CDT)
7007-7210	55 North Scott Road , McKinney, TX 75070	PurchaseAgreement	Transaction	5/18/2009 3:59:16 PM (CDT)
7007-7210	55 North Scott Road , McKinney, TX 75070	Commission Instructions	Transaction	5/18/2009 3:50:56 PM (CDT)
7007-7210	55 North Scott Road , McKinney, TX 75070	Earnest Money	Transaction	5/18/2009 3:50:44 PM (CDT)
6996-7199	2219 56th Avenue NW , Frisco, TX 75035	Purchase Agreement	Transaction	5/15/2009 9:00:03 AM (CDT)

Total Documents: 10

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

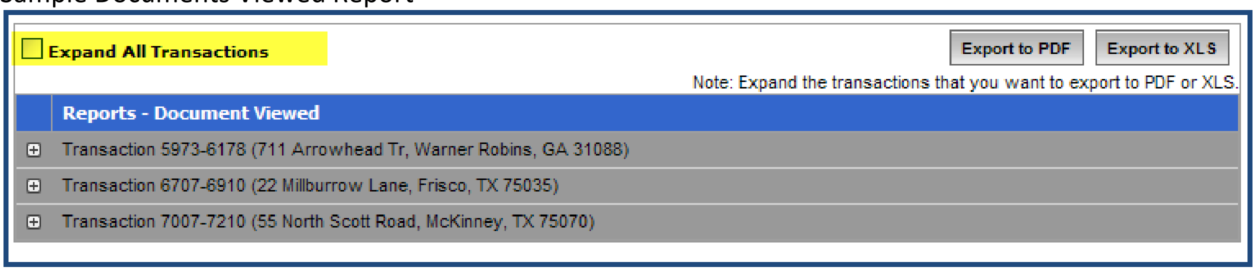
Creating a Documents Viewed Report

1. Click the **Reports** tab.
2. Select **Documents Viewed Report.**



3. Select the **Branch, Agent Status, Agent, Agent Representation, Transaction Status** (Optional: Other Filters).
4. Click **Search**

Sample Documents Viewed Report



Choose the **Expand** key to view a detailed Document Viewed Report

Reports - Document Viewed

* **Branch:**	FNRES Realty
* **Agent Status:**	Active
* **Agent:**	Stacey Semore
* **Agent Represents:**	All
* **Transaction Status:**	All
Other Filters:	- Select -

Search

☑ **Expand All Transactions**

Export to PDF | Export to XLS

Note: Expand the transactions that you want to export to PDF or XLS.

Reports - Document Viewed

⊟ Transaction 5973-6178 (711 Arrowhead Tr, Warner Robins, GA 31088)

Document Name	Upload Date	Viewed By	Viewed Date	Email	Phone
Purchase & Sale Agreement	7/16/2007 4:06:41 PM (CDT)	Brandon Grey	4/1/2009 1:36:53 PM (CDT)	brandongrey@email.com	
Purchase & Sale Agreement	7/16/2007 4:06:41 PM (CDT)	Rick Stemmons	7/16/2007 6:04:40 PM (CDT)	connie.shaw@fnres.com	972-346-3146
Commission Instructions	7/16/2007 4:06:25 PM (CDT)	Rick Stemmons	7/16/2007 6:04:23 PM (CDT)	connie.shaw@fnres.com	972-346-3146

⊟ Transaction 6707-6910 (22 Millburrow Lane, Frisco, TX 75035)

Document Name	Upload Date	Viewed By	Viewed Date	Email	Phone
Agent Inspection Disclosure	5/21/2009 3:04:27 PM (CDT)	Claire Coordinator	5/21/2009 3:06:51 PM (CDT)	connie.shaw@fnres.com	972-346-7100
Publish price change	5/21/2009 2:49:44 PM (CDT)	Claire Coordinator	2/23/2009 2:30:38 PM (CST)	connie.shaw@fnres.com	972-346-7100

⊟ Transaction 7007-7210 (55 North Scott Road, McKinney, TX 75070)

Document Name	Upload Date	Viewed By	Viewed Date	Email	Phone
Commission Instructions	5/18/2009 3:50:56 PM (CDT)	Connie Shaw	5/18/2009 4:06:39 PM (CDT)	connie.shaw@cyberhomes.c	972-346-7100
PurchaseAgreement	5/18/2009 3:59:16 PM (CDT)	Claire Coordinator	5/18/2009 4:05:36 PM (CDT)	connie.shaw@fnres.com	972-346-7100

5. This report can be exported to **.pdf** or **.xls.**

Profiles & Preferences

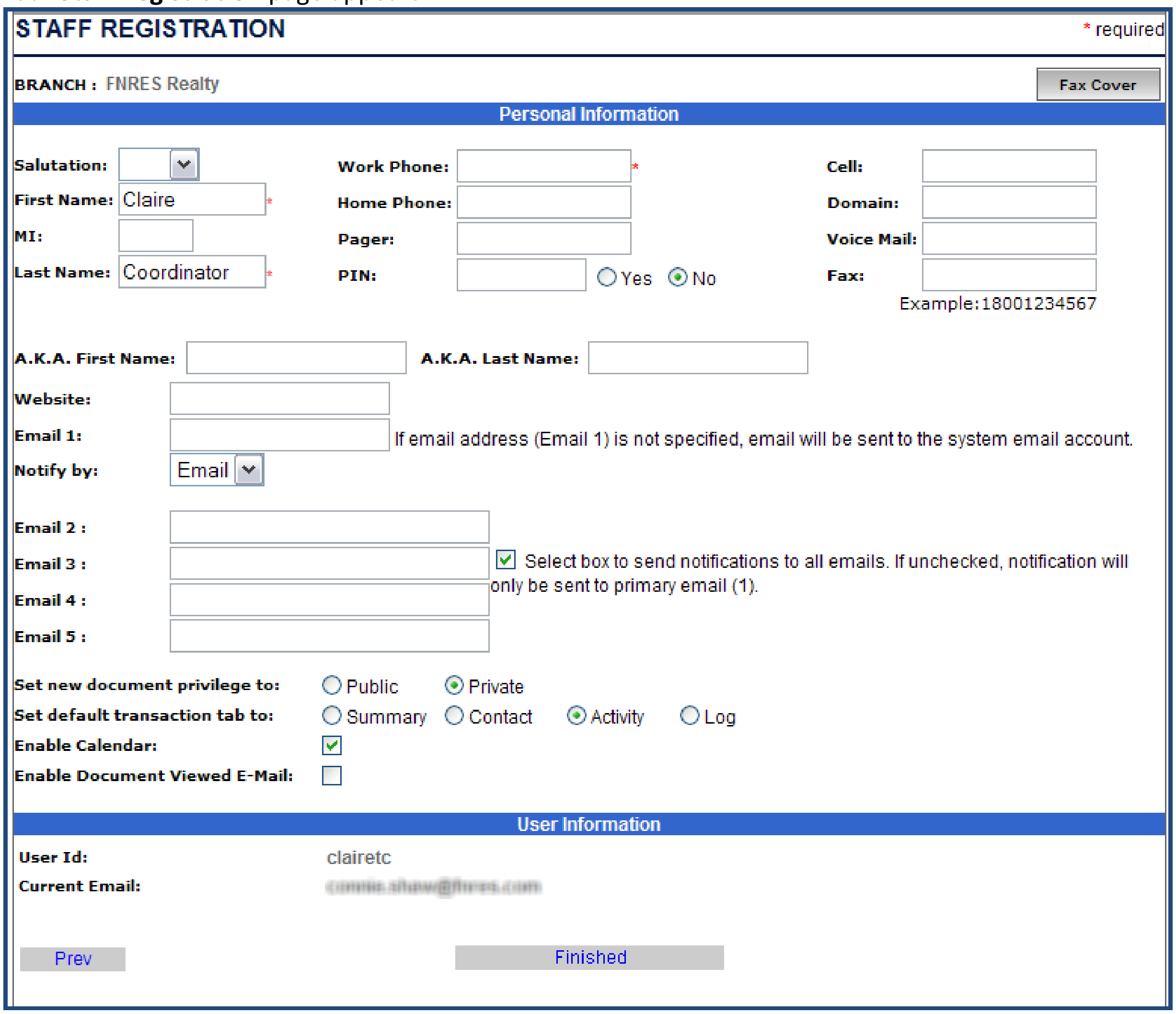
Use the Profiles & Preferences tab to modify your profile, change your password, view preferred providers and set up packet services.

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.



STAFF REGISTRATION
* required
BRANCH : FNRES Realty
Fax Cover
Personal Information
Salutation:
First Name: Claire *
MI:
Last Name: Coordinator *
Work Phone: *
Home Phone:
Pager:
PIN: Yes No
Cell:
Domain:
Voice Mail:
Fax:
Example:18001234567
A.K.A. First Name:
A.K.A. Last Name:
Website:
Email 1:
If email address (Email 1) is not specified, email will be sent to the system email account.
Notify by: Email
Email 2 :
Email 3 :
Email 4 :
Email 5 :
Select box to send notifications to all emails. If unchecked, notification will only be sent to primary email (1).
Set new document privilege to: Public Private
Set default transaction tab to: Summary Contact Activity Log
Enable Calendar:
Enable Document Viewed E-Mail:
User Information
User Id: clairetc
Current Email:
Prev
Finished

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.

Note:

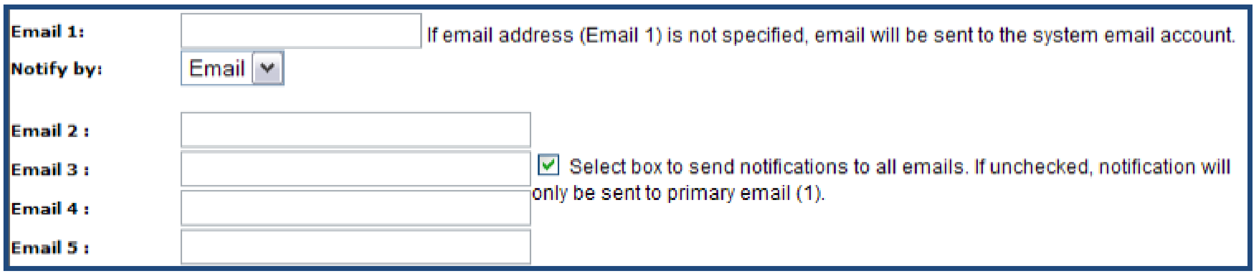
- Set new document privilege to Public versus Private – This setting affects documents that come into the transaction through email or faxes from other parties.
- Enable Calendar – this feature will display a **calendar** link in the main toolbar. You can view transactions by the day, week, month or utilize a search or export feature.
- Enable Document Viewed Email – this will generate an email to you notifiying you of documents that are viewed by other parties. Notification Type **Email** must be selected to receive these notifications.

Adding Additional E-Mail Addresses

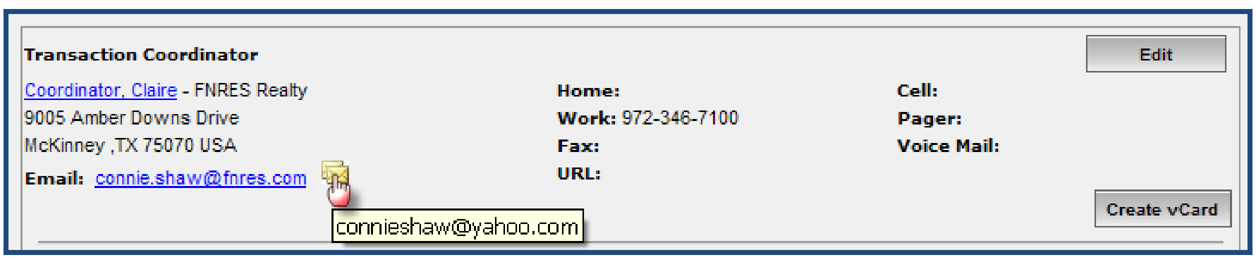
You can have up to five e-mail addresses within TransactionPoint. TransactionPoint can send e-mail messages, notifications, and alerts to each of these addresses. Email 1 is always treated as your primary e-mail address. E-mail messages will always be sent to Email 1. You have the option to have messages 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.
3. 3. Click **Finished** when you are done updating your profile.



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 associated with this user are displayed.



Please note the following parameters for e-mail addresses:

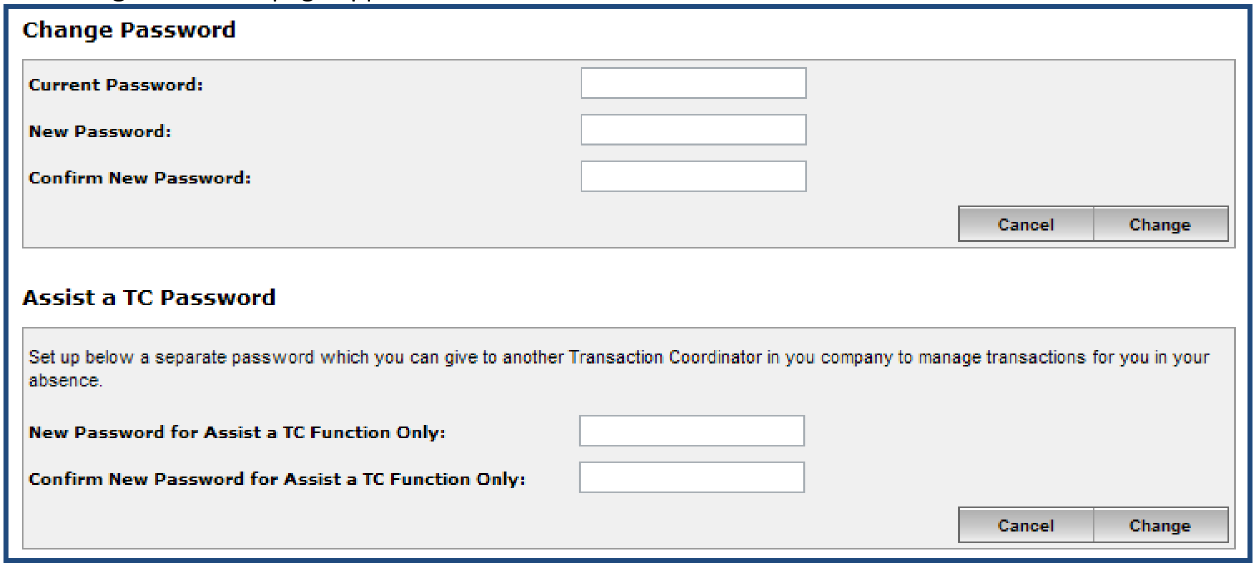
- TransactionPoint will track the multiple e-mail addresses in the Communication Log.
- Letter Writer will display only the e-mail address entered for Email 1.
- vCard functionality will display only the e-mail address entered for Email 1.
- For CSV uploads additional e-mail addresses can be uploaded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

Changing Your Password

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

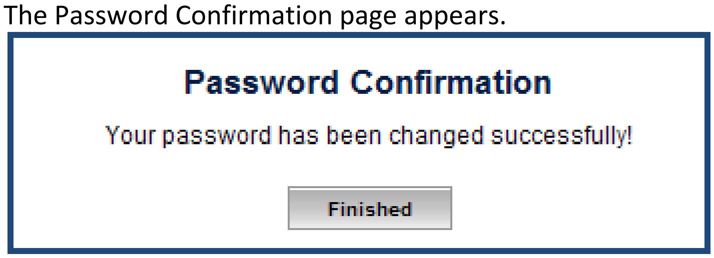
1. Click the **Profile & Preferences** tab.
2. Click **User Passwords**.

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 page appears.

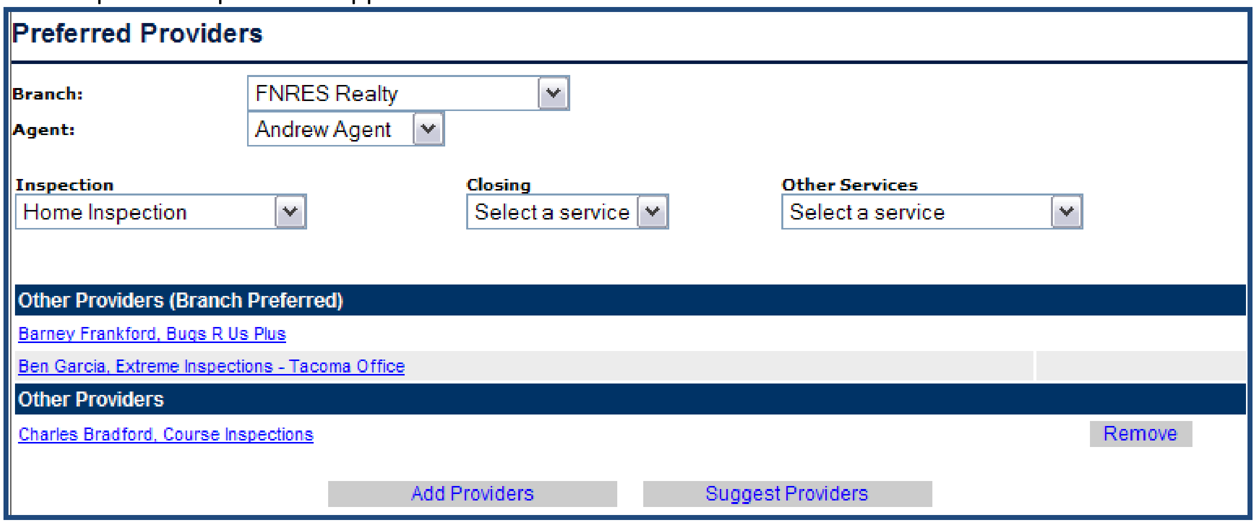


7. Click **Finished**.

Preferred Providers

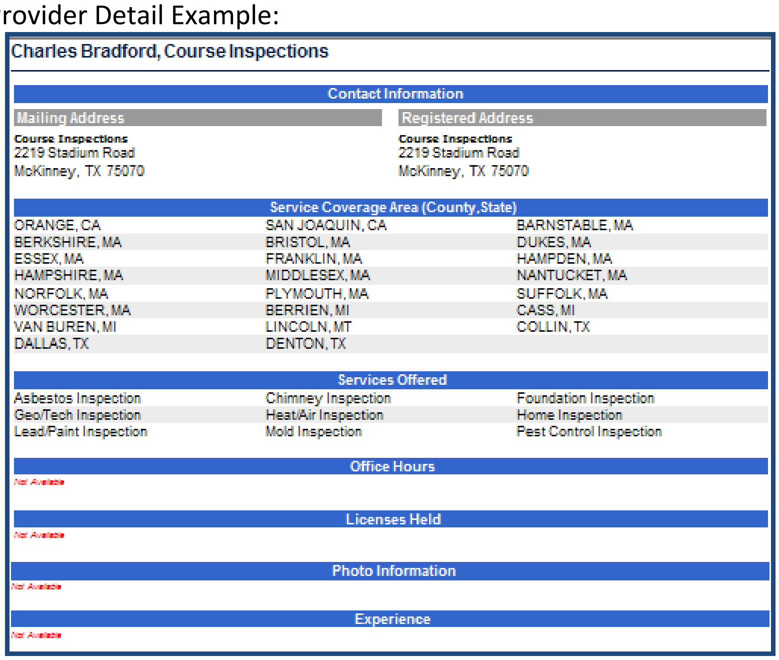
The **Preferred Providers** area of TransactionPoint allows you to view Branch selected preferred providers as well as view/modify Agent preferred providers.

1. Click **Profile & Preferences,** Select **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.
   a. **Add Provider** – allows you flag a provider as preferred for the Agent you have selected. You can search by name or list all providers in the directory.
   b. **Suggest Providers** – Use this feature to recommend suggest preferred providers.
   c. **Remove** – this link will remove the provider from the Agents' preferred provider list.

Provider Detail Example:



6. Click **Close** to close the **Provider Detail** page.

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:

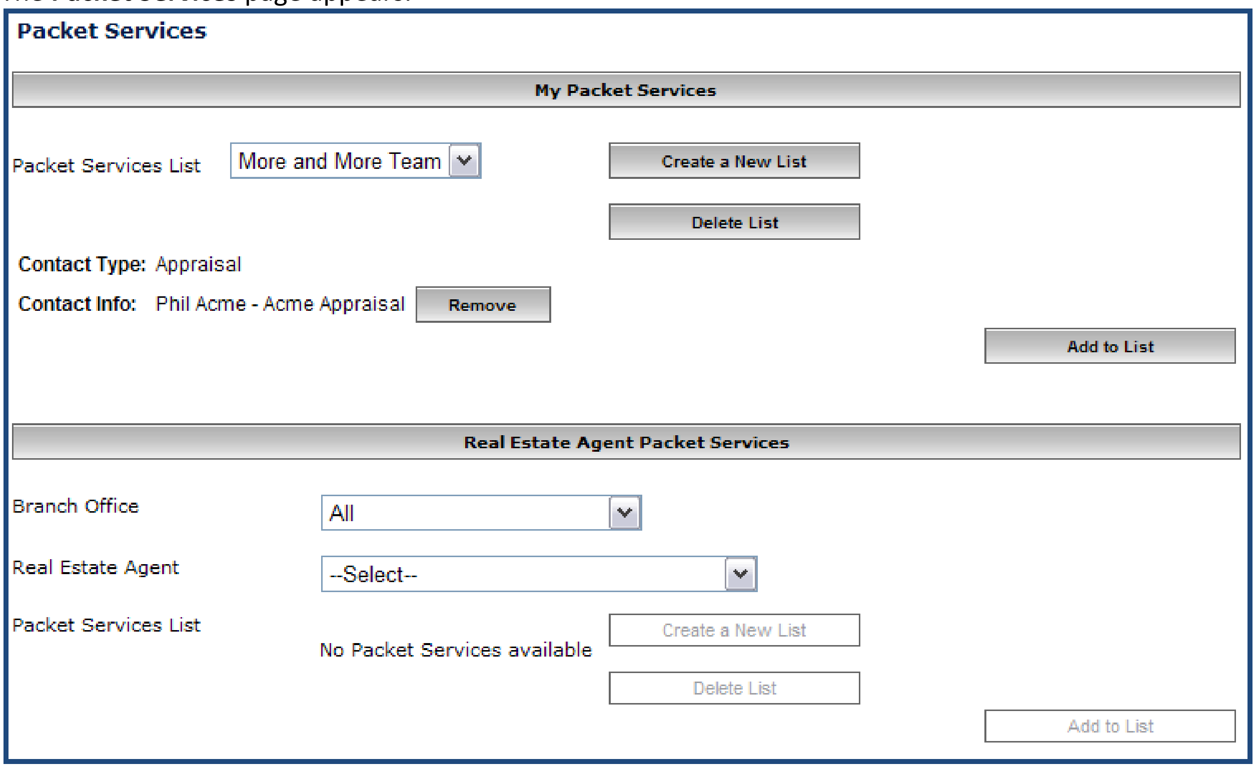
1. **My Packet Services** are lists of your preferred providers.
2. **Real Estate Agent Packet Services** are lists of agent-preferred providers.

You may wish to set up **Packet Services** to easily add multiple service providers to a file at once.

Creating a My Packet Services List

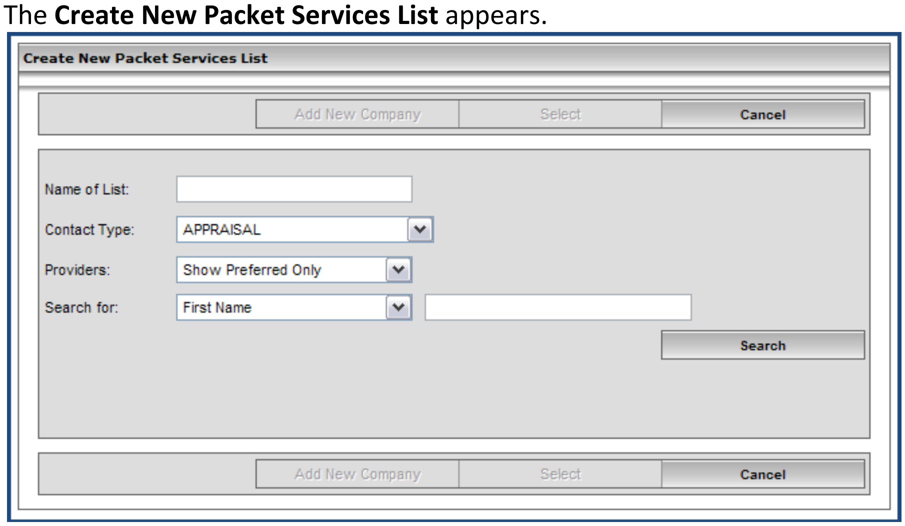
1. Click the **Profile & Preferences** tab, select **User Packet Services**.

   The **Packet Services** page appears.



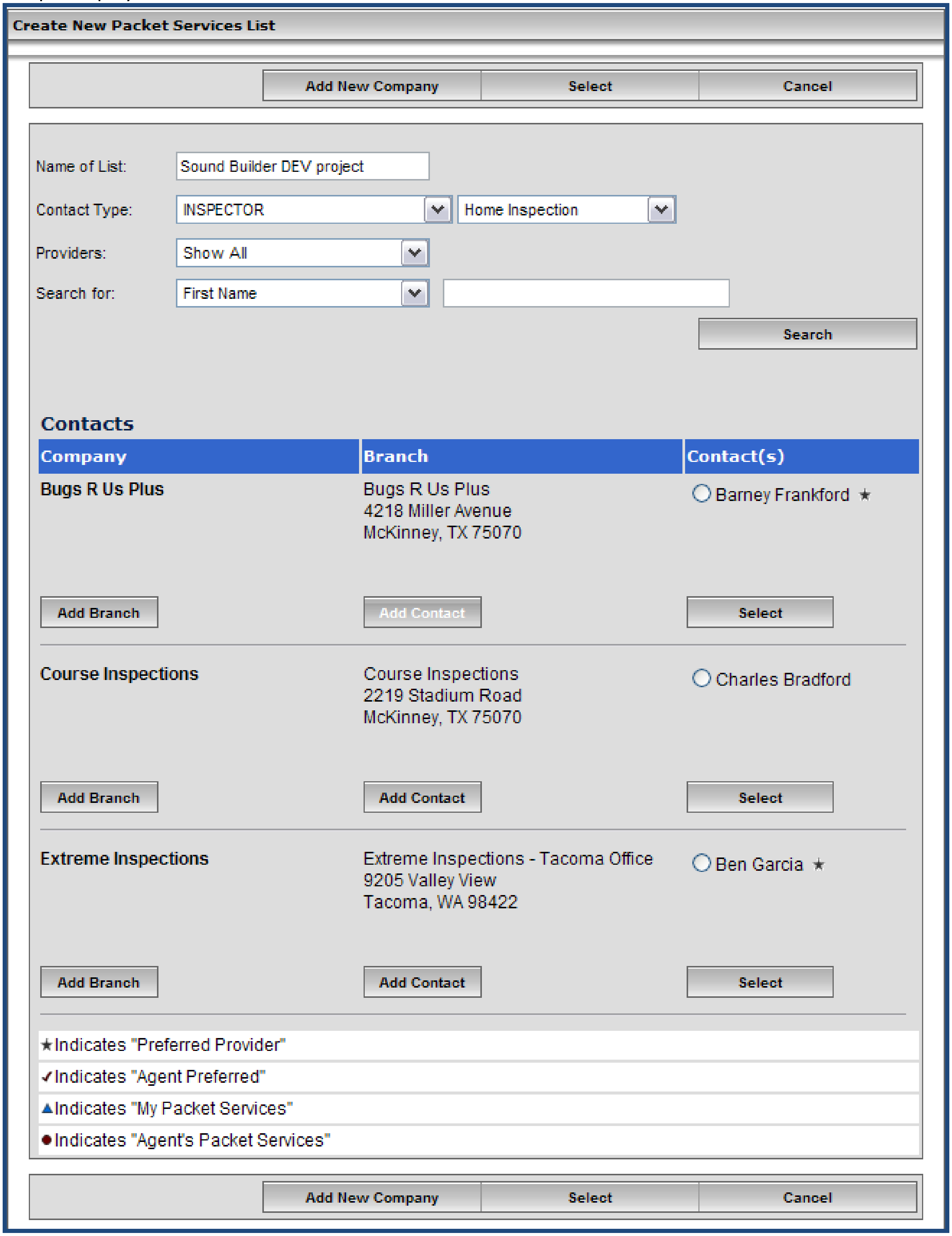
2. Click **Create a New List**.

   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.
4. Select the service category from the **Contact Type** list.
5. Select either **Show Preferred Only** or **Show All** from the **Providers** list.
6. Select the **Search for** criteria and input characters to narrow your search (not required).
7. Click **Search**

Sample display of Service Provider Search results



8. Select from the displayed list of providers by clicking the appropriate radial button next to the service providers name. You may also refine your search.
9. Click **Select** to add the selected provider to your newly created list.

Note: When you create a new list you must also add your first service provider at that time.

Note: If you do not find the provider company you are searching for, click **Add New Company**. If you do not find the provider branch you are searching for, click **Add Branch**. If you do not find the provider user you are looking for, click **Add Company**.

Note: You may add multiple types of service providers to one list regardless of category. Example: Create a list titled “Home Inspection Companies” and add as many Home Inspection Type companies to the list as you wish.

Tip: *Often times users are added by TC’s with different company names. Example: First Title or 1st Title. To avoid duplicate entry, be sure to search all possible results before adding new companies, branches or users.*

Adding a Single Provider Type to Current Packet Services List

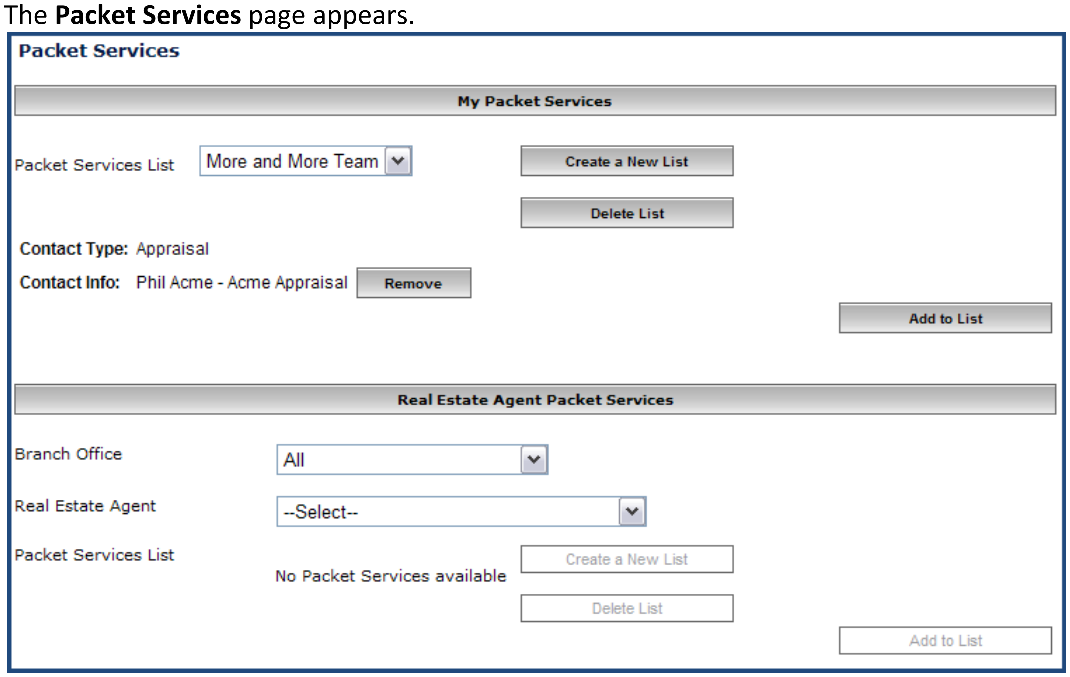
1. Select the packet from the **Packet Services List** and click **Add to List**.
2. Select the service category from the **Contact Type** list.
3. Select either **Show Preferred Only** or **Show All** from the **Providers** list.
4. Select the **Search for** criteria and input characters to narrow your search (not required).
5. Click **Search**

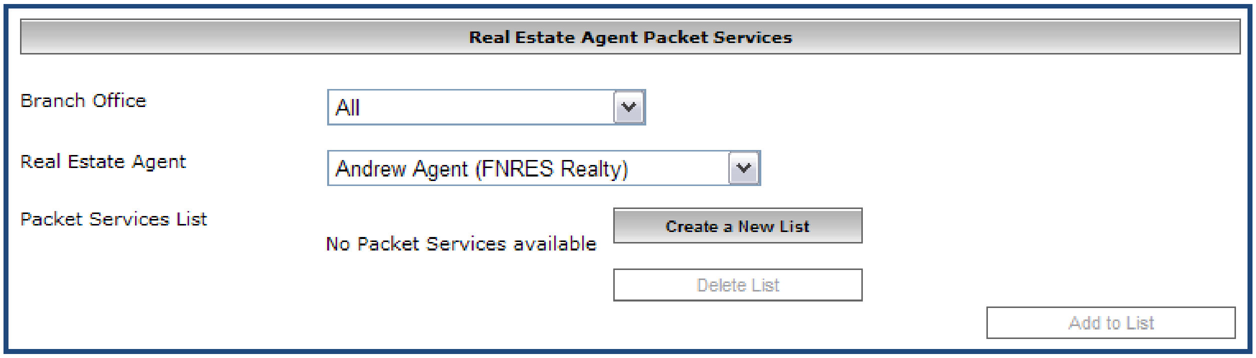
Real Estate Agent Packet Services

Creating an Agent Packet Services List

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

The **Packet Services** page appears.

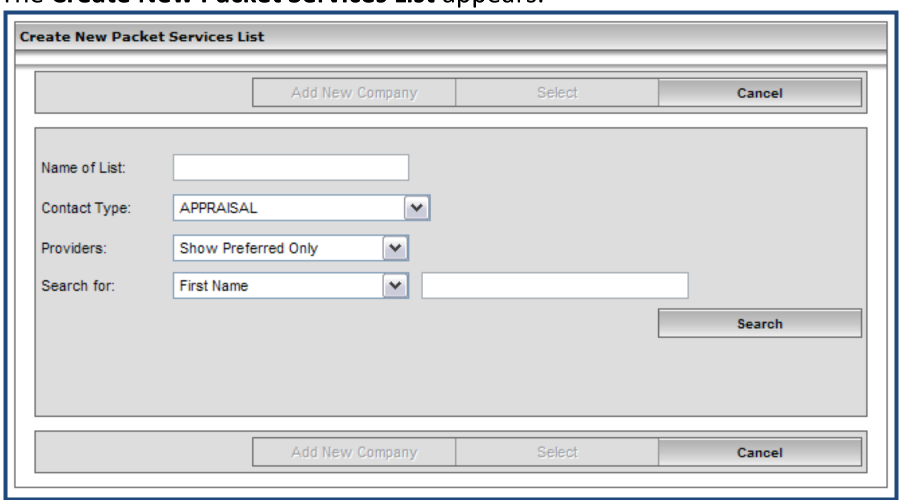




2. In the Real Estate Agent Packet Services section:
   a. Select the branch office from the **Branch Office** list.
      Note: If your access is a single branch only, that branch automatically appears in the Branch Office list. If your access is to multiple branches, **All** appears in the Branch Office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

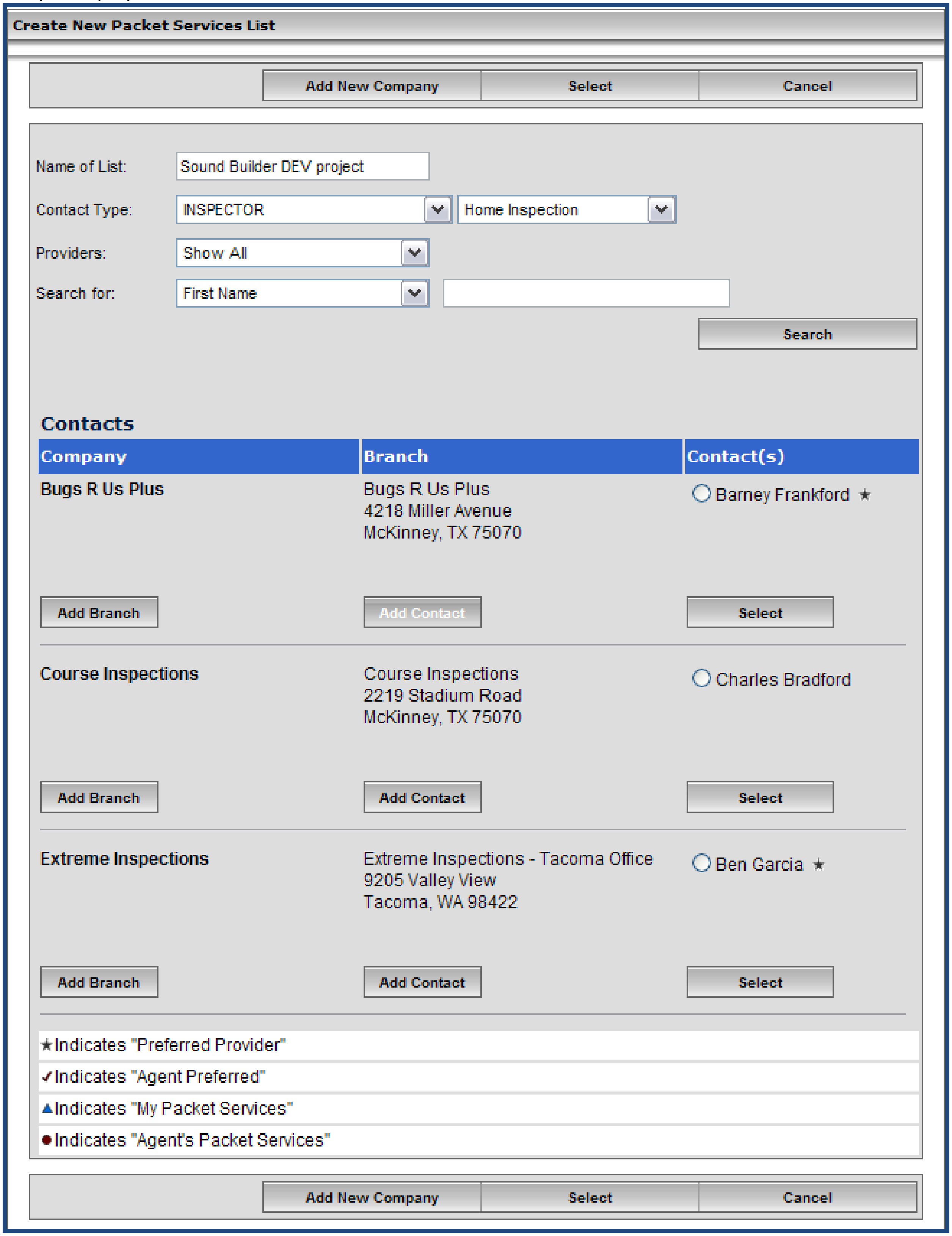
3. Click **Create a New List**.

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



4. 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.
5. Select the service category from the **Contact Type** list.
6. Select either **Show Preferred Only** or **Show All** from the **Providers** list.
7. Select the **Search for** criteria and input characters to narrow your search (not required).
8. Click **Search**

Sample display of Service Provider Search results


Create New Packet Services List

Add New Company | Select | Cancel

Name of List: Sound Builder DEV project

Contact Type: INSPECTOR | Home Inspection

Providers: Show All

Search for: First Name

Search

Contacts

Company	Branch	Contact(s)
Bugs R Us Plus	Bugs R Us Plus 4218 Miller Avenue McKinney, TX 75070	Barney Frankford ★
Add Branch	Add Contact	Select
Course Inspections	Course Inspections 2219 Stadium Road McKinney, TX 75070	Charles Bradford
Add Branch	Add Contact	Select
Extreme Inspections	Extreme Inspections - Tacoma Office 9205 Valley View Tacoma, WA 98422	Ben Garcia ★
Add Branch	Add Contact	Select

★Indicates "Preferred Provider"

✓Indicates "Agent Preferred"

▲Indicates "My Packet Services"

●Indicates "Agent's Packet Services"

Add New Company | Select | Cancel

9. Select from the displayed list of providers by clicking the appropriate radial button next to the service providers name. You may also refine your search.
10. Click **Select** to add the selected provider to your newly created list.

Note: When you create a new list you must also add your first service provider at that time.

Note: If you do not find the provider company you are searching for, click **Add New Company**. If you do not find the provider branch you are searching for, click **Add Branch**. If you do not find the provider user you are looking for, click **Add Company**.

Note: You may add multiple types of service providers to one list regardless of category. Example: Create a list titled "Home Inspection Companies" and add as many Home Inspection Type companies to the list as you wish.

Tip: *Often times users are added by TC's with different company names. Example: First Title or 1st Title. To avoid duplicate entry, be sure to search all possible results before adding new companies, branches or users.*

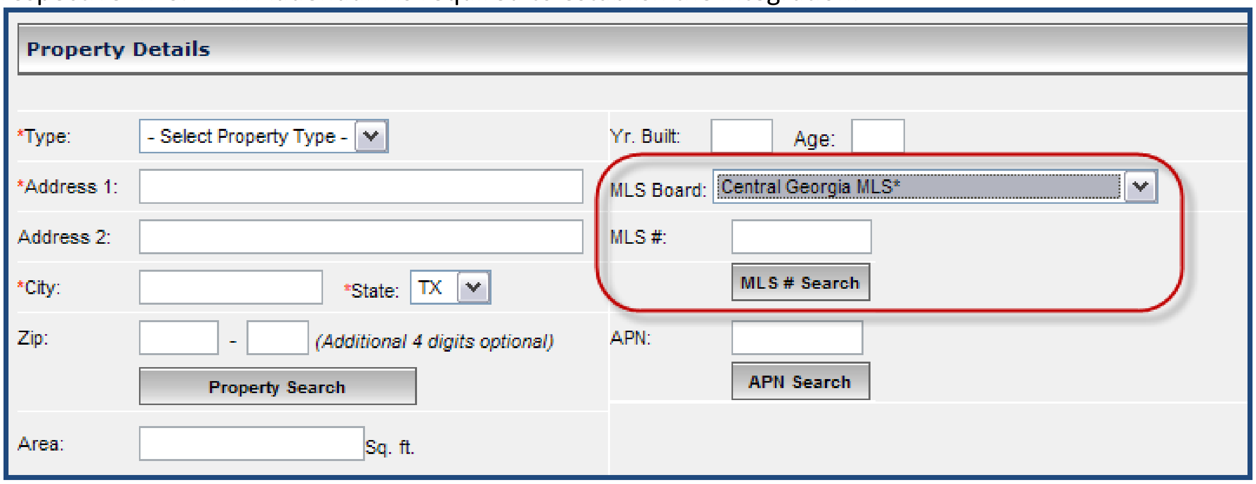
Note: My Packet Services will be available in every transaction you have created. Real Estate Agent Packet Services will be available only when the agent is the primary agent in a transaction you have created.

Additional Features

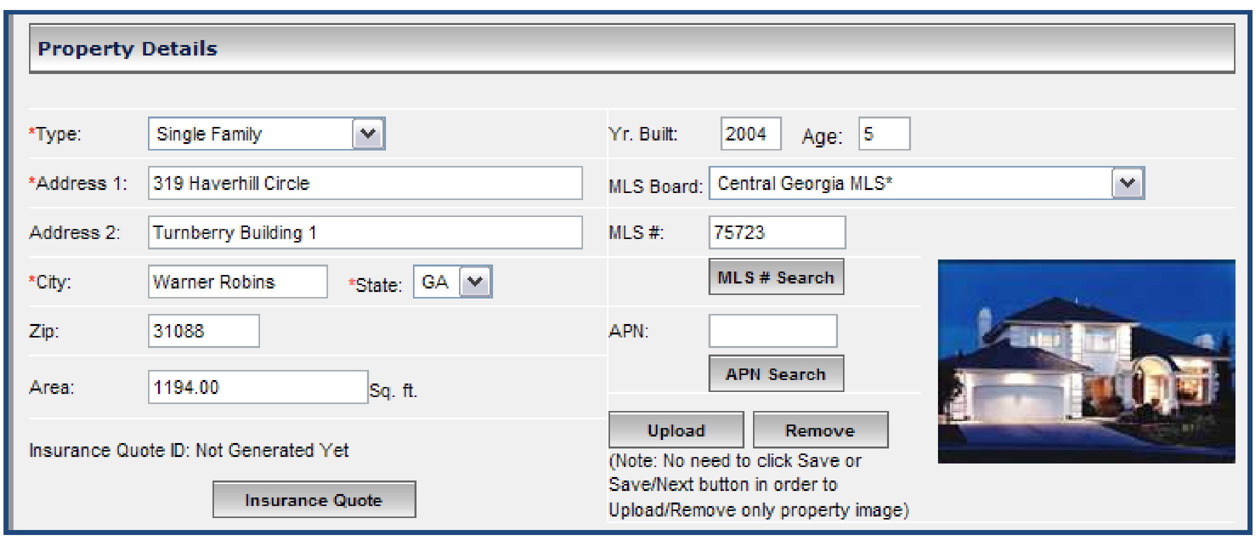
TransactionPoint offers some additional features through integrations and feature switches so you can make the most of the application. Our Team is dedicated to persistently enriching the program with meaningful solutions to better your experience. This section of the User Guide will provide you details about these additional features.

Importing Information from the MLS

TransactionPoint Professional Users (where available) can import property information from their respective MLS. An Addendum is required to establish the integration.



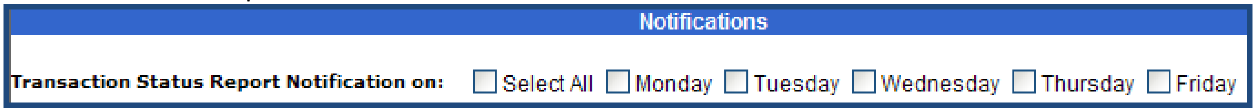
1. During the **Create Transaction** process, select the MLS Board name in the **Property Details** section.
2. Enter an **MLS #**
3. Click **MLS Search**
4. TransactionPoint will auto-populate **Property Details** (where available) along with the primary photo of the property.



Note: Pulling the **APN number** through the APN Search will not populate a photo. After creating a transaction, navigate back to the Transaction Summary Page to upload a photo from your computer using the **Upload** link.

Transaction Status Reports

Agents have the ability to opt whether or not they wish to receive a full transaction status report. This report can be enabled from their **Profile** page. Agents may select how often they wish to receive transaction status reports.



Note: Emails containing the full .pdf report for a transaction are distributed at 5:00 AM (PST). Only **Active** transactions will be included (Pending and Pre-Sale).

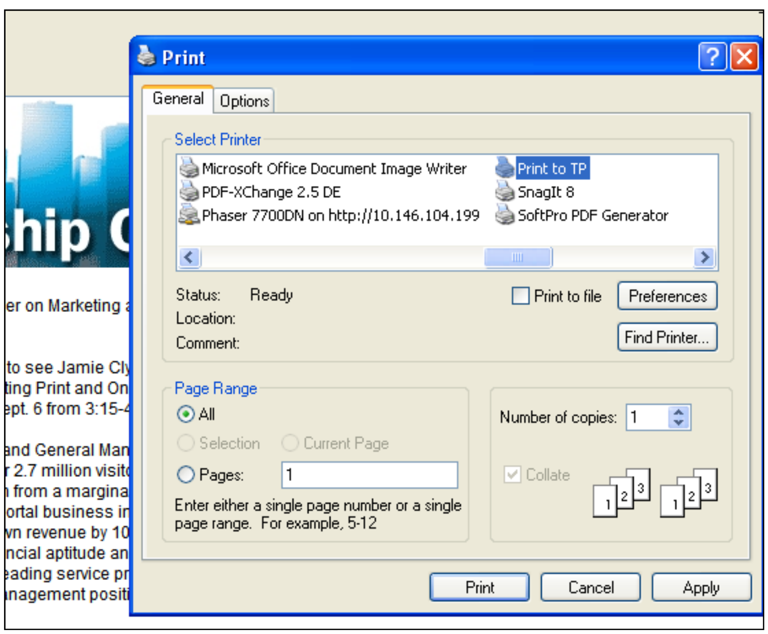
Document Management Live (DML)

The DML was designed to allow the Transaction Coordinator or Full Access agent with an ability to upload multiple documents at once to a transaction, activity or order. The DML also includes a TP Printer that allows the user to **Print to TP** rather than printing to their respective printers. Users may find this tool helpful in viewing all documents related to a transaction, activity or order.

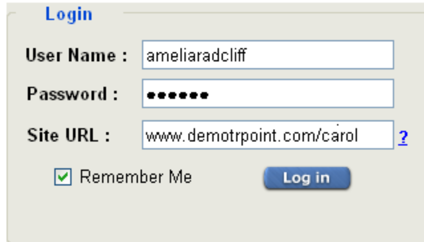
This unique tool may be downloaded from the **Documents** tab. Due to frequent updates to the program, whenever a new release is issues that includes a piece to the DML, you should uninstall the old DML and install a new one

Once you have downloaded the **Document Management Tool**, you may use it to post documents to your transactions.

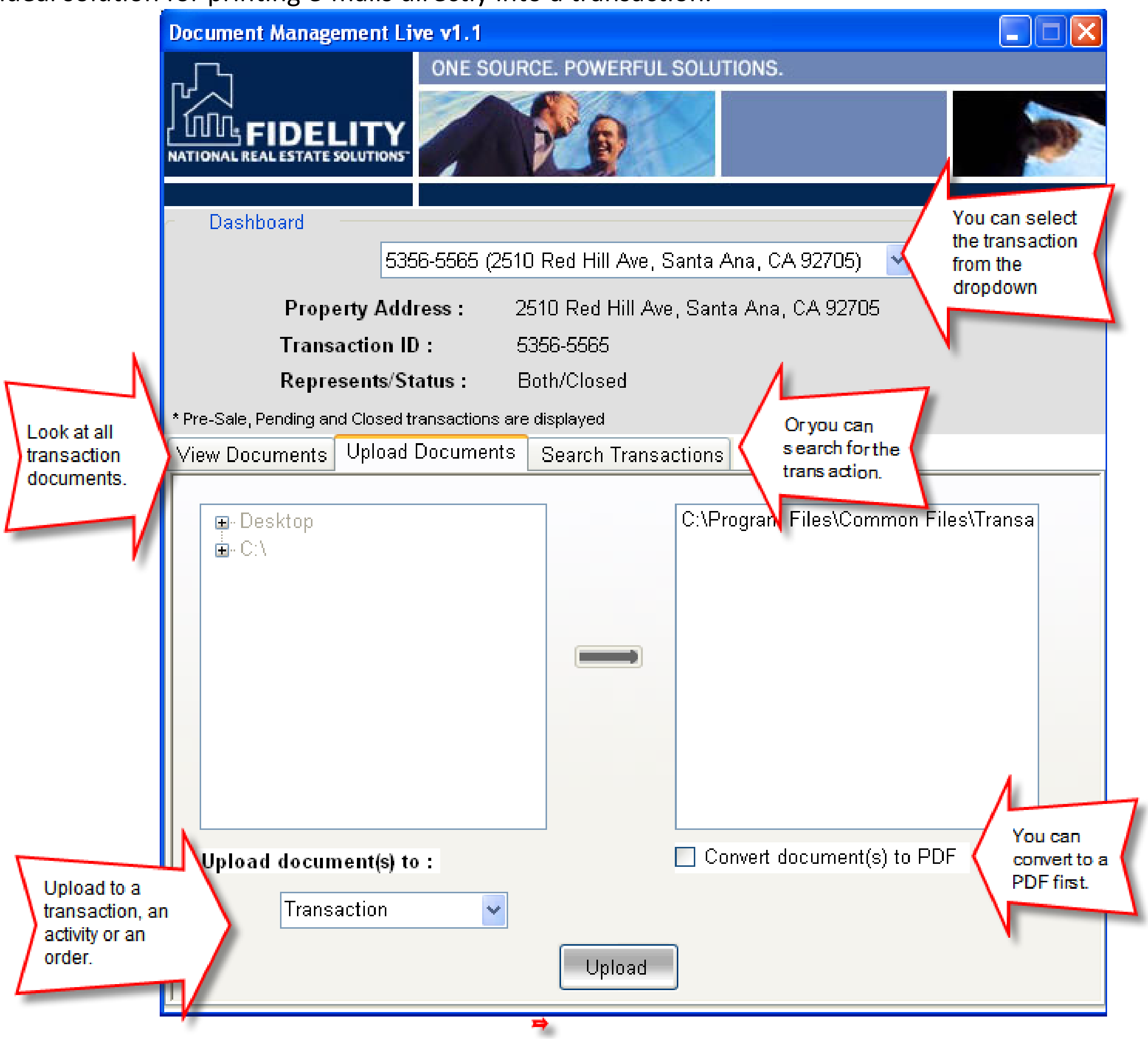
To print a page or a document directly to a transaction, select the 'File > Print' option, choose 'Print to TP' as the printer and click 'Print.' It is not necessary to be logged on to TransactionPoint to use this feature.



A login box will open requesting user name, password, and the full address of the agent's TransactionPoint site. This information can be saved for future use by checking 'Remember Me.'



The Document Management Live window shows the available options to store the document. This is an ideal solution for printing e-mails directly into a transaction.



Note: If the 'Print to TP' option does not display when File>Print is selected, the TP Printer Monitor may need to be started manually. If it is running, the Print Monitor icon will be seen in the system tray on the bottom right hand corner of the screen.

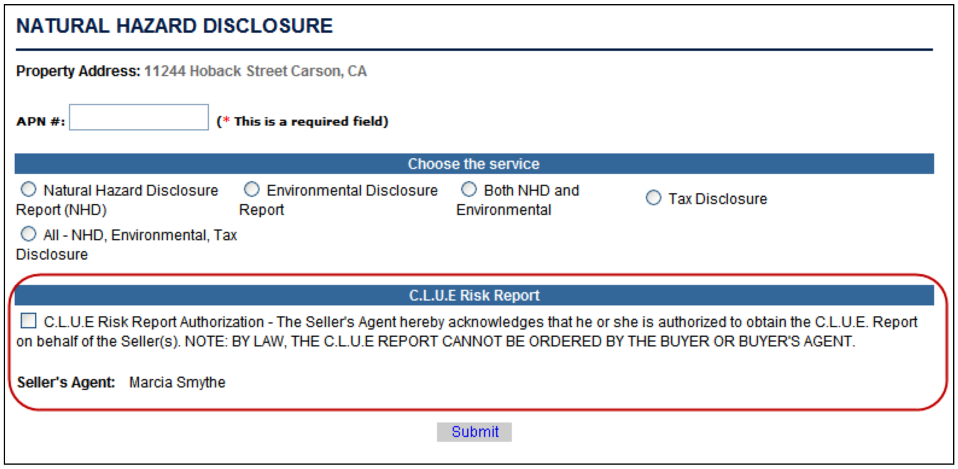
If it is not running, or if it is closed accidentally, it can be restarted easily by clicking through this sequence: Start>All Programs>TransactionPoint>TP Printer Monitor.

You can start this process manually whenever you wish to simply upload multiple documents at once.

Note: If you use the **Print to TP** function and attach a document to an activity, the document will carry the default privileges for that activity.

C.L.U.E. Report Order

When placing an order for Natural Hazard Disclosures, a C.L.U.E. report can be requested. This requires that the seller's agent be entered on the Transaction Contacts page. If the seller's agent is not entered, the circled section of the order form below will not appear.


NATURAL HAZARD DISCLOSURE

Property Address: 11244 Hoback Street Carson, CA

APN #: (* This is a required field)

Choose the service

Natural Hazard Disclosure Report (NHD)
Environmental Disclosure Report
Both NHD and Environmental
Tax Disclosure
All - NHD, Environmental, Tax Disclosure

C.L.U.E Risk Report

C.L.U.E Risk Report Authorization - The Seller's Agent hereby acknowledges that he or she is authorized to obtain the C.L.U.E. Report on behalf of the Seller(s). NOTE: BY LAW, THE C.L.U.E REPORT CANNOT BE ORDERED BY THE BUYER OR BUYER'S AGENT.

Seller's Agent: Marcia Smythe

Submit

Integration

DocCentral Integration

With increasing adoption of DocCentral™ by MLS' across the country, MLS members who are users of TransactionPoint® want to be able to copy documents from DocCentral into TransactionPoint. Although a user in DocCentral can e-mail a document to a transaction, a closer integration is necessary.

Allowing a Transaction Coordinator or a Full Access Agent in TransactionPoint to easily access documents from DocCentral will be managed as many other implementations: provide the agent's DocCentral credentials to TransactionPoint and allow the TransactionPoint user to select a folder and import the desired document(s.)

There are two parts to this integration: Full Access Agent features and Transaction Coordinator features:

- If a Transaction Coordinator is accessing documents for a transaction, the program will use the Listing or MLS number to identify a property. Since that number is not required by either TransactionPoint or DocCentral, users should be aware of this: if the MLS number is missing on either TransactionPoint or DocCentral, folders in DocCentral will not be available.

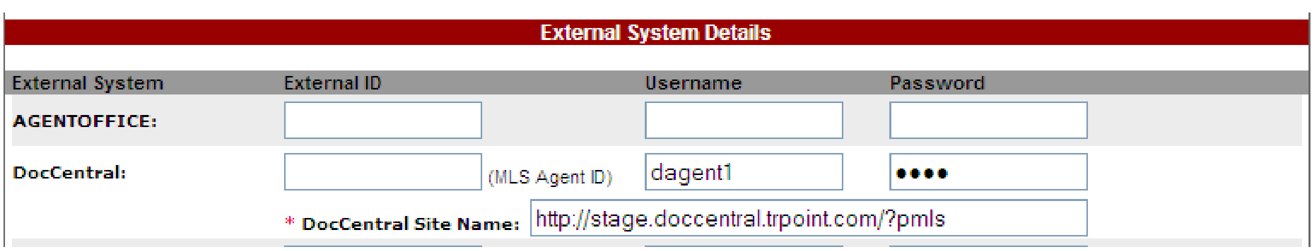
- If the user is a Full Access Agent, all of his/her files will be displayed from which to select documents.

Contact your administrator for more details.

Agent Profile

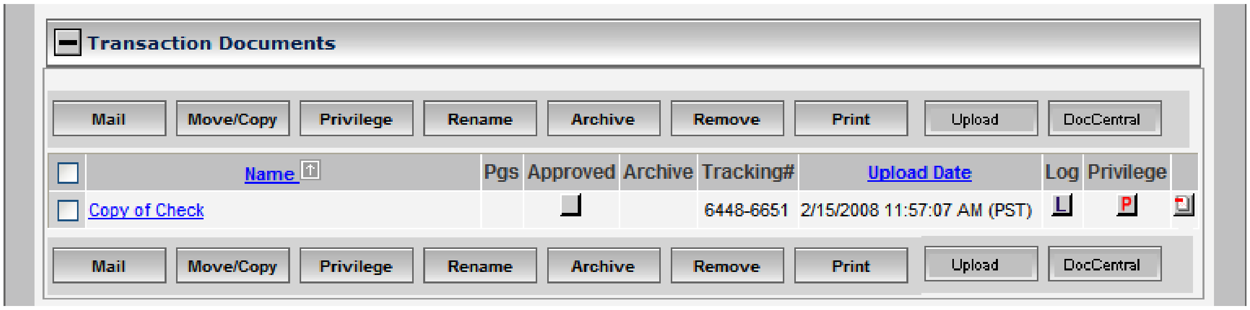
The 'External System Details' section of the agent profile in TransactionPoint will be expanded to include the agent's DocCentral credentials. The DocCentral site URL, and the agent's Username, and MLS Agent ID and/or DocCentral password will be needed to enable TransactionPoint to identify the user in DocCentral. (The external ID is the agent's MLS ID.)

This information can be updated by the agent, the branch or company administrator, the branch or company manager and/or the site administrator.



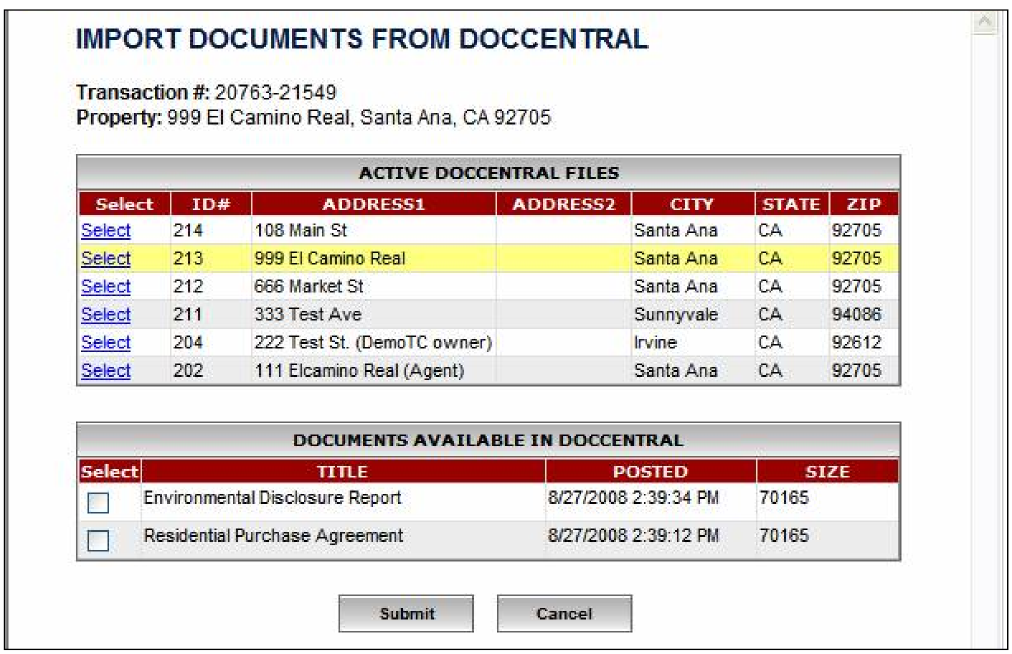
Transaction Documents Box -Activities-Key Dates-Orders-Documents Page

The Upload Documents button will be reduced in size and the label will be changed to ‘Upload.’ A new button labeled ‘DocCentral’ will be available. If there are no DocCentral credentials in the TransactionPoint profile of the primary agent, the DocCentral button will not display.

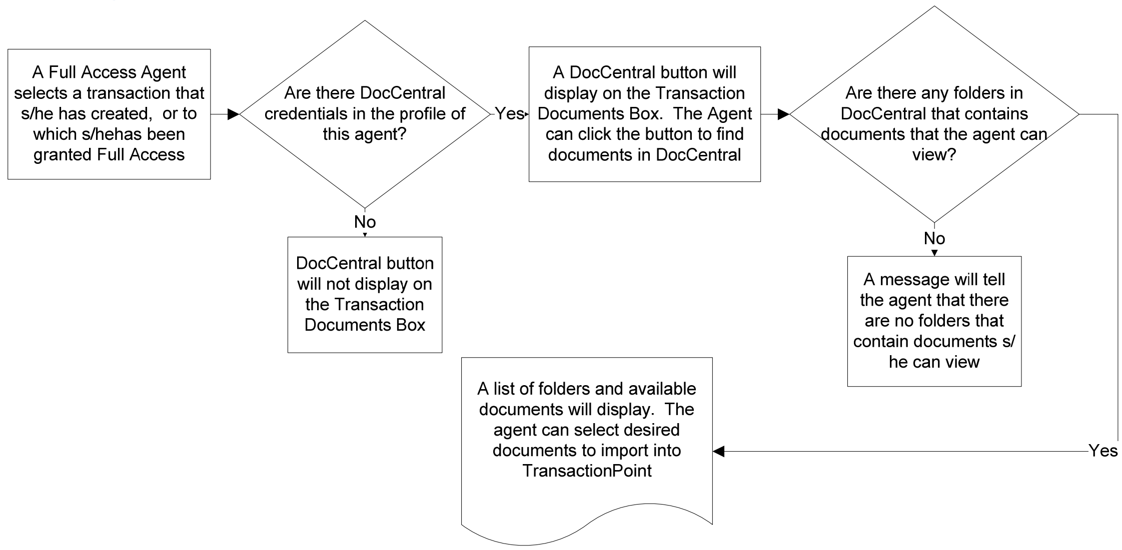


Full Access Agent

If the user logged in to TransactionPoint has DocCentral access credentials in his/her profile and full access to the transaction, the ‘DocCentral’ button will appear in the Transaction Documents section. When it is clicked,, the list of files available to that user in DocCentral will display. If the transaction has an MLS listing ID entered, and a matching ID is found in the DocCentral list, that file will be preselected, and the document list for that file will be displayed.



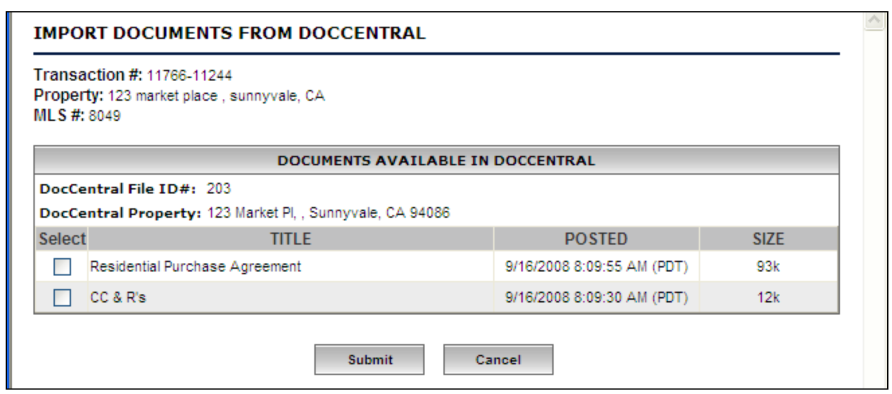
Full Access Agent Workflow



Transaction Coordinator

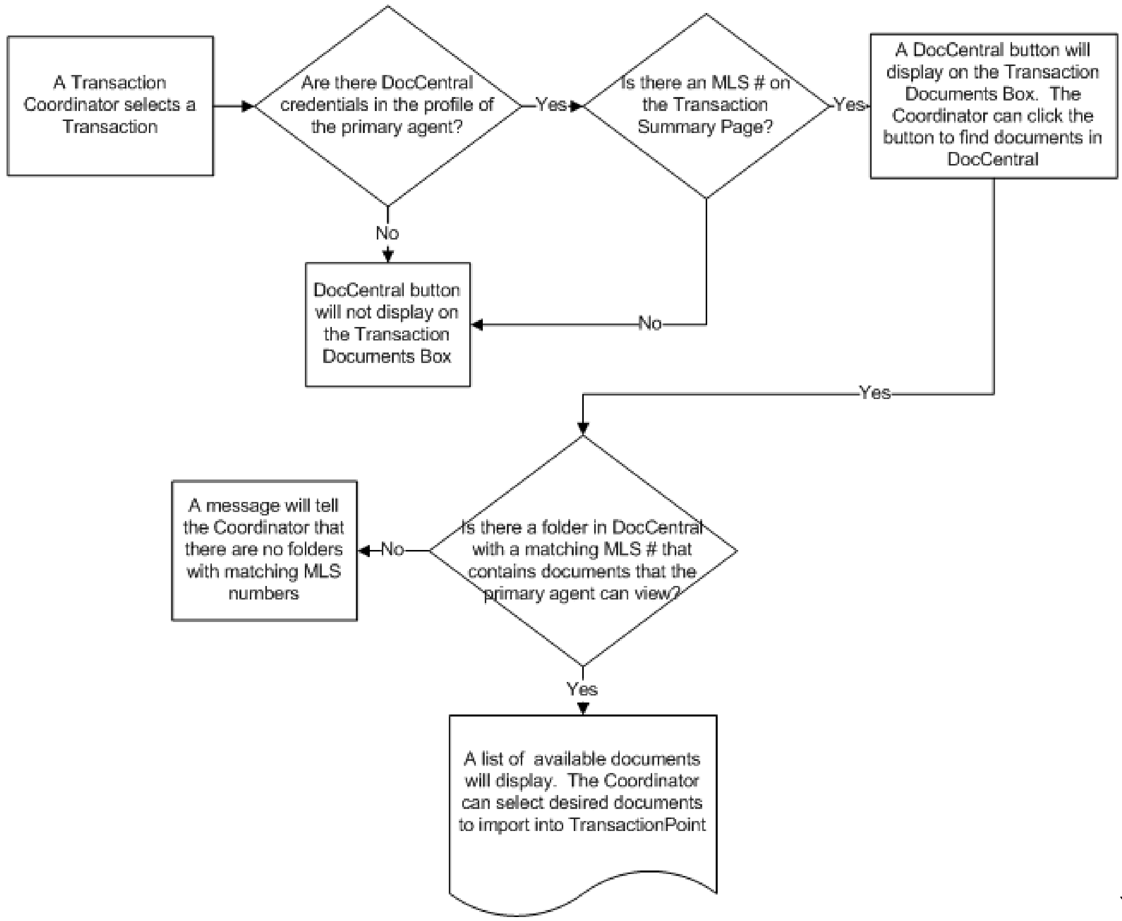
When a Transaction Coordinator is logged in and the primary agent in the transaction has login credentials for DocCentral in his/her profile and there is an MLS listing ID entered in TransactionPoint, the 'DocCentral' button will appear.

When the Coordinator clicks the DocCentral button, a list of documents available to the primary agent for that property in DocCentral will appear. If there are multiple folders in DocCentral with the same MLS# that contain documents available to the agent, only the most recently created folder will appear. (A future enhancement will modify this feature to display all folders with the same MLS number if they contain documents available for the agent to view.)



Selecting the desired document(s) and clicking 'Submit' will copy the document into the Transaction Document Box.

Transaction Coordinator Workflow

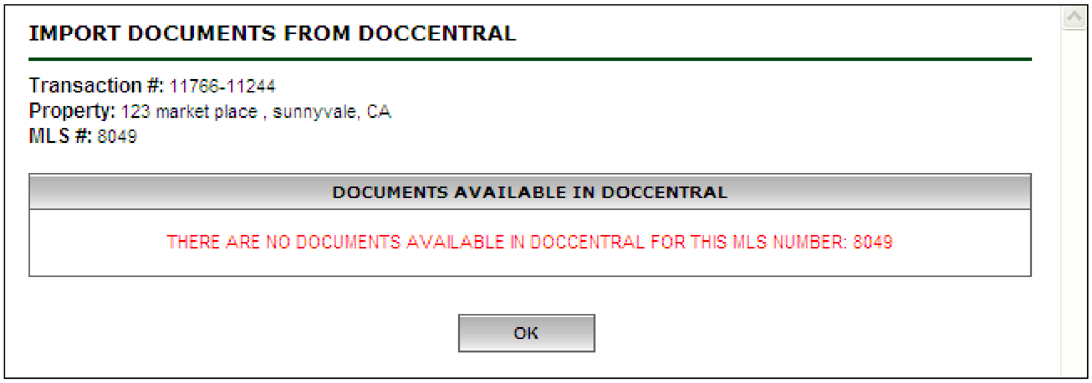


Viewing Privilege of Imported Documents

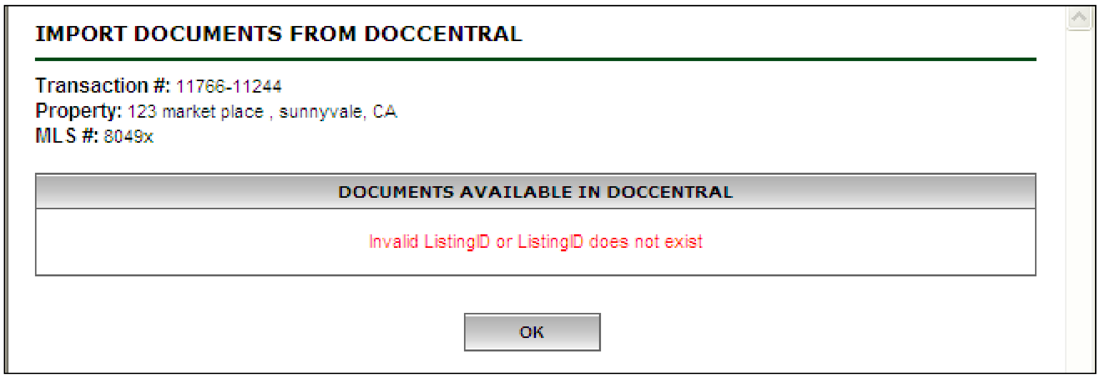
If the viewing privilege of the document imported from DocCentral is 'Public' then the privilege in TransactionPoint will be 'Public.' If the viewing privilege of the document imported from DocCentral is 'Private', the privilege of the document in TransactionPoint will be 'Private.' Privileges assigned to specific contacts in DocCentral will not be carried over to TransactionPoint; the document will simply be tagged 'private.'

Messages

If the matching file(s) in DocCentral is one in which the agent is identified as a contact but does not have permission to see any documents, then no documents will appear on this display. If the agent has not uploaded any documents to a file s/he has created, no documents will appear on the display. TransactionPoint will simply note that there are no documents available.



If there are no files with matching MLS numbers in DocCentral, the message will read:



Communication Log

An entry will be made in the Communication Log in the 'Documents' category indicating that the document(s) was imported from DocCentral™. The entry will read: <DocumentName> uploaded from DocCentral <DCSiteName>.

DPN Integration

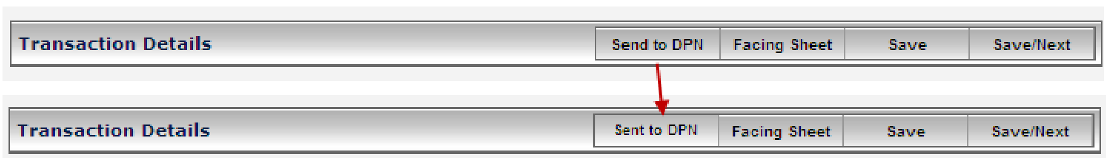
The system will validate fields required by DPN and will not allow a transaction to be sent to DPN unless all of the required fields are complete.   Missing fields in one or more transactions will generate an error message.

Four new features are available for DPN Users:

1. The Transaction Details page will clearly note that a file has been sent to DPN
2. An entry will be made in the transaction's communication log when a file is successfully sent to DPN.
3. When DPN accepts a file, the DPN File ID will be displayed on the Transaction Details page.
4. E-mail notification will be sent to anyone designated by the Site Administrator when a transaction is sent to DPN.

DPN Feature Details

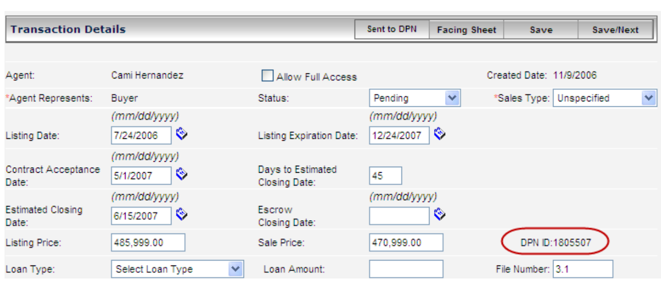
1. When a file is successfully sent to DPN, the 'Send to DPN' button will change to a display reading 'Sent to DPN':



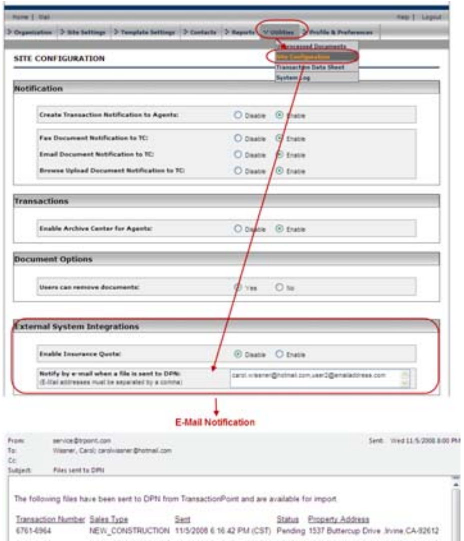
2. The Communication Log will show that the file was sent to DPN:

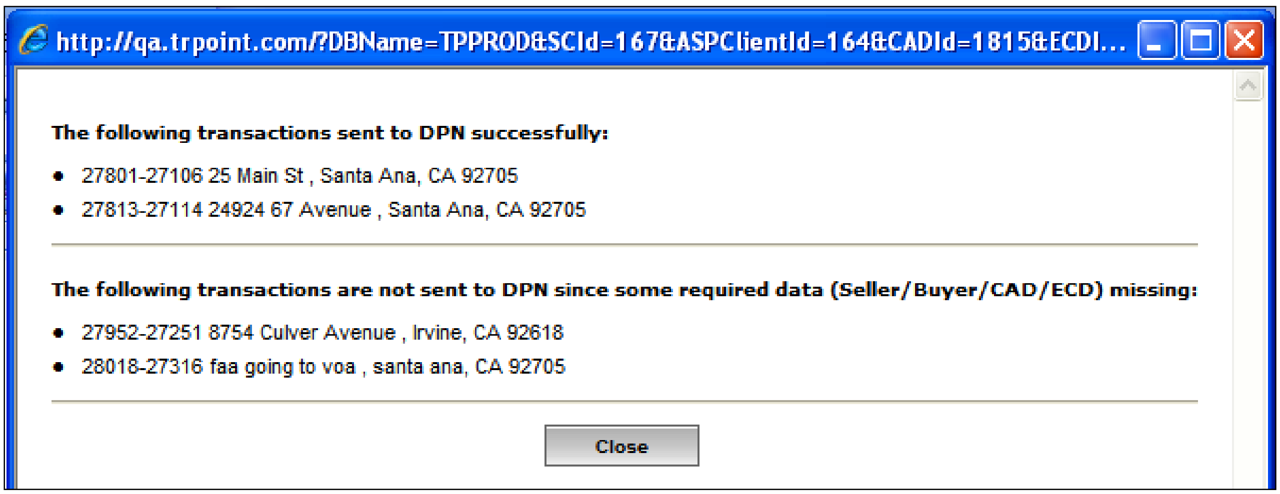
Type	Date Time	Who	To	Comments
TXN	11/5/2008 1:31:07 PM (PST)	Amelia Radcliff	DPN	Transaction data sent to DPN

3. The display of the DPN File ID may take some time to display, since the two systems communicate with each other on a time schedule that is specific to each site.   It may become available in five minutes, or could take several hours.



4. The Site Administrator can designate one or more e-mail addresses to receive notification when a file has been posted to DPN.   Select 'Utilities', then 'Site Configuration' and enter the desired addresses under 'External System Integrations.'


SITE CONFIGURATION
Notification
Transactions
Document Options
External System Integrations
E-Mail Notification

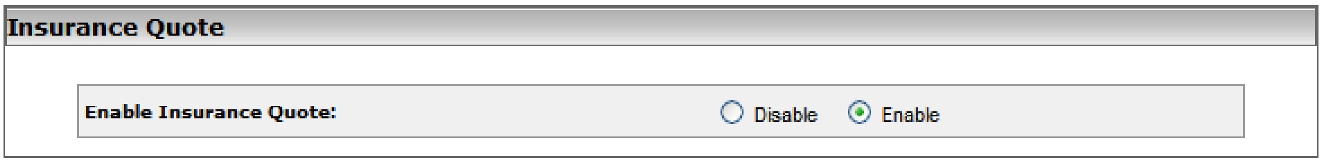

http://qa.trpoint.com/?DBName=TPPROD&SCId=167&ASPClientId=164&CADId=1815&ECDI...
The following transactions sent to DPN successfully:
27801-27106 25 Main St , Santa Ana, CA 92705
27813-27114 24924 67 Avenue , Santa Ana, CA 92705
The following transactions are not sent to DPN since some required data (Seller/Buyer/CAD/ECD) missing:
27952-27251 8754 Culver Avenue , Irvine, CA 92618
28018-27316 faa going to voa , santa ana, CA 92705
Close

Homeowners Insurance Quote

NOTE: The insurance quote feature can be enabled by the Site Administrator, but the quotes will not be available within individual transactions immediately.

A new, optional feature that can be enabled by the Site Administrator allows Transaction Coordinators and Full Access Agents to request a Homeowners Insurance Quote from Fidelity National Insurance Company for single family residential properties.

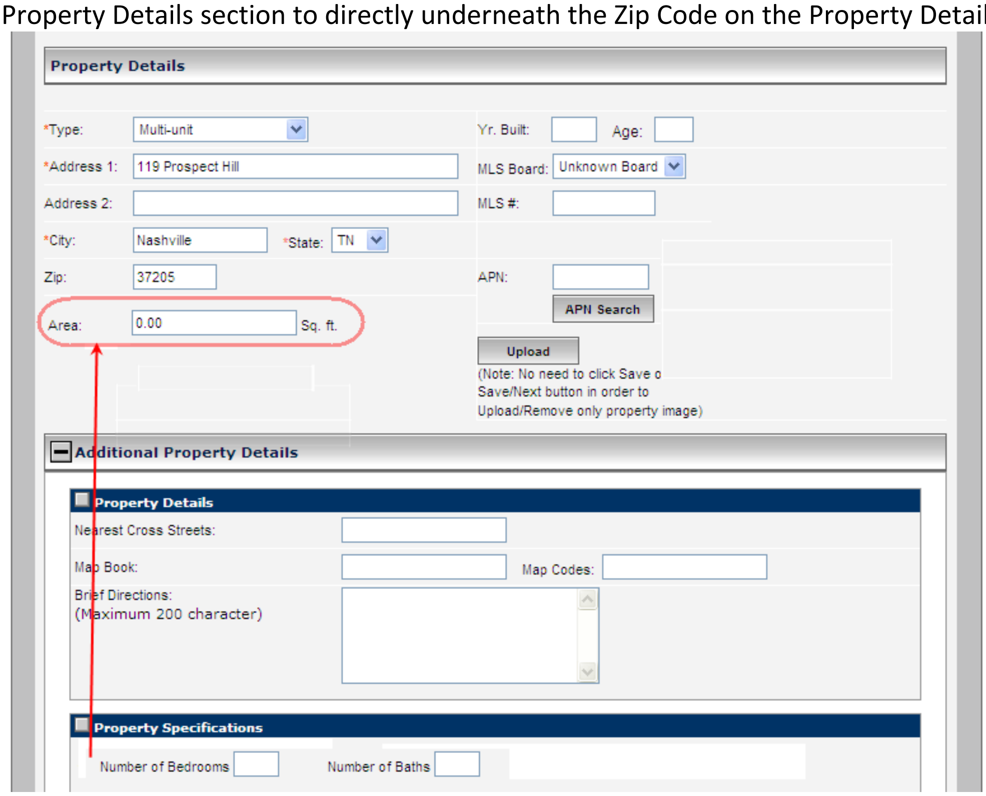
To enable this feature, the Site Administrator must enable the option under 'Site Configuration.'



If the feature is enabled, an insurance quote will automatically be generated for a transaction that meets the follow criteria:

- Status – Pending
- Representation – Buyer, Both, or Dual
- Property Type – Single Family
- Buyer's name has been entered
- Zip code has been entered
- Area (square footage) has been entered

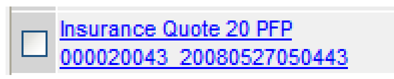
Since square footage is a required field for the quote, the 'Area' field has been moved from the Additional Property Details section to directly underneath the Zip Code on the Property Details section.



As long as the above criteria are satisfied, the insurance quote will automatically be generated once the buyer's contact information has been saved. If the representation is 'Seller' no quote will be generated, and there will be no reference to a quote on the Transaction Summary page.

If representation is changed from Dual or Both to Seller and a quote has not been generated yet, there will be no reference to a quote on the Transaction Summary page. However, if a quote had been previously generated before representation was changed, it will remain in the transaction documents box and the 'Insurance Quote' button will also remain.

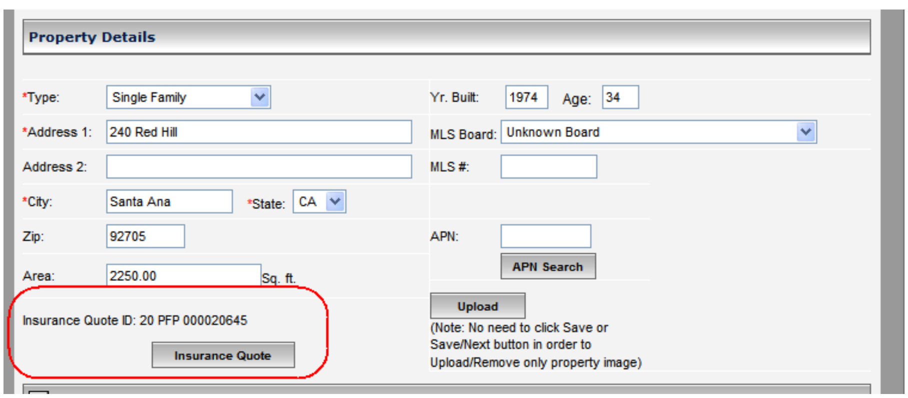
The insurance quote will return as a PDF that will be stored in the transaction's Transaction Document box. The document name will be determined by the code that is attached to the quote; it will appear as: 'Insurance Quote *Quote ID*.' An example is displayed here:



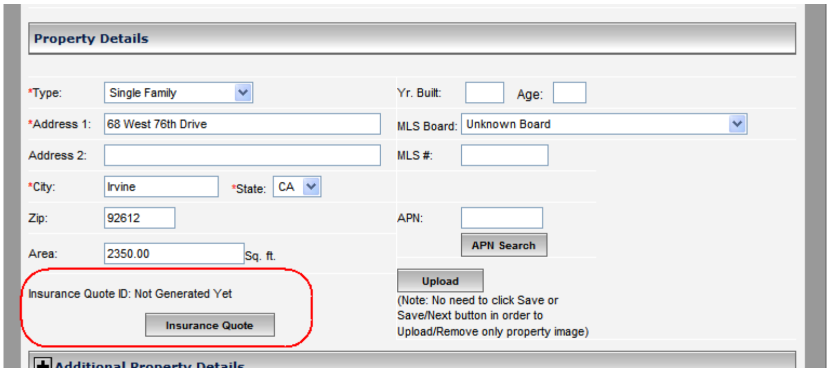
The default document permission will be determined by the Public/Private option selected in the user's profile. The document can be managed as any other: printed, emailed, moved to an activity, etc.

An entry will be made in the DOC section of the Communication Log noting the placement of the quote in the Transaction Documents box.

The Quote number will be displayed on the Transaction Summary page and a button will appear labeled 'Insurance Quote' in case additional quotes are required if information changes.



If the system cannot generate a quote automatically when the transaction is entered because one or more of the required elements is missing, the Quote Number will be replaced by the text: 'Not Generated Yet.' The user can push the 'Insurance Quote' button to obtain a quote if the auto-generation has not been done.



If the quote is not auto-generated, and the user clicks the 'Insurance Quote' button and one or more of the required elements is missing, an error message will display telling the user what data is missing.
For example:

> **The following error(s) occurred:**
> - Buyer is required.
> - Year Built is required.

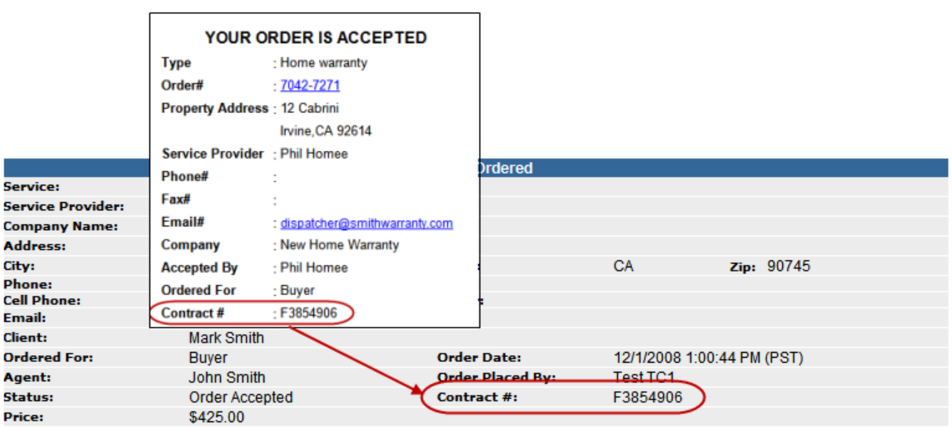
If the user clicks the 'Insurance Quote' button and receives a message reading:

> **The following error(s) occurred:**
> There was an error getting Insurance Quote. Please try again later.

this means that the Insurance Site is temporarily unavailable, or the property type is not 'Single Family.'

Users must remember to save any changes being made on the Transaction Summary page before clicking the 'Insurance Quote' button.

If a Home Warranty order is accepted by a service provider and a contract number is provided, that number will display on the order acceptance that is e-mailed to the transaction coordinator or full access agent, and will also display on the order detail when it is viewed by the agent, transaction coordinator and service provider.

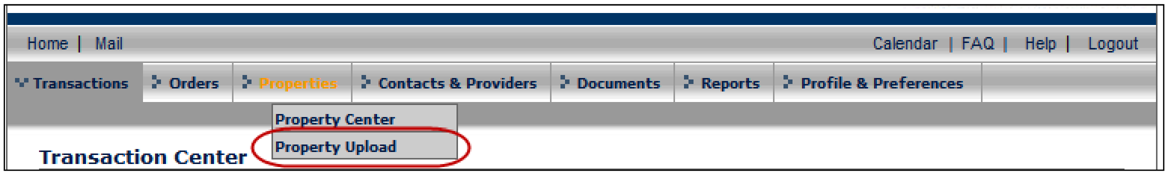


Property Upload

Overview

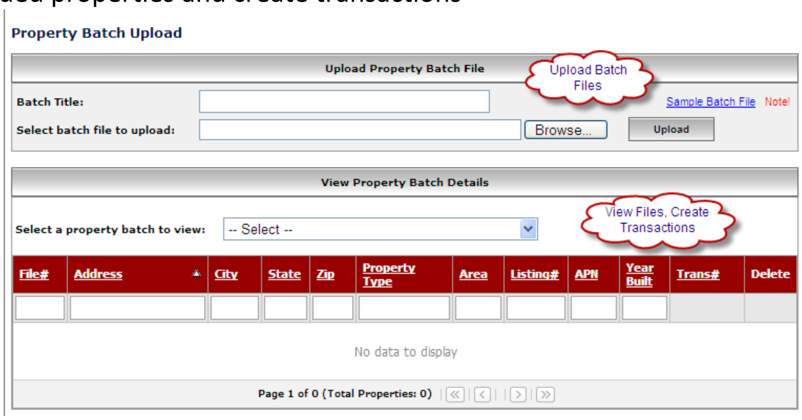
For those users who have large volumes of properties for which they would like to create transactions, a Property Upload feature has been added to TransactionPoint®. This will be valuable for new condo construction, rehabs, or any other volume transactions.

A new center has been added under the 'Properties' tab labeled 'Property Upload.' This feature is available to Transaction Coordinators and Full Access Agents.



The 'Property Batch Upload' page has two sections:

1. Upload properties using an Excel .csv file
2. Find uploaded properties and create transactions

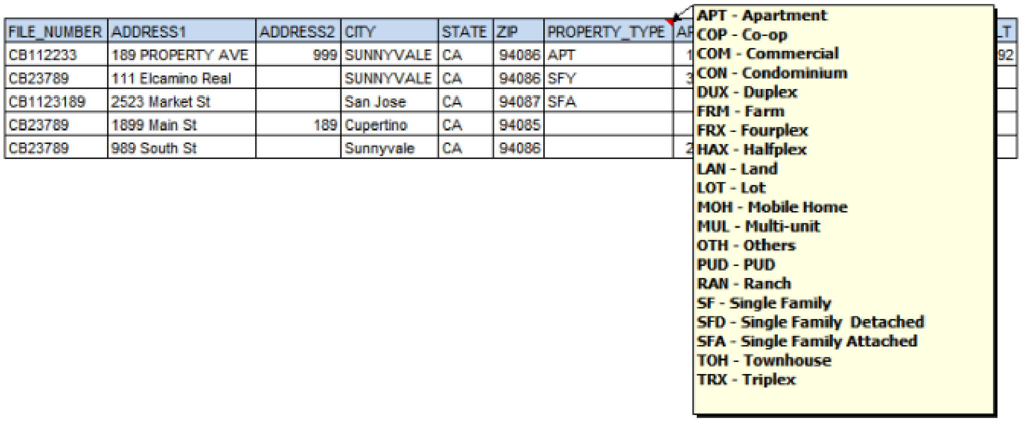


Uploading Property Batch Files

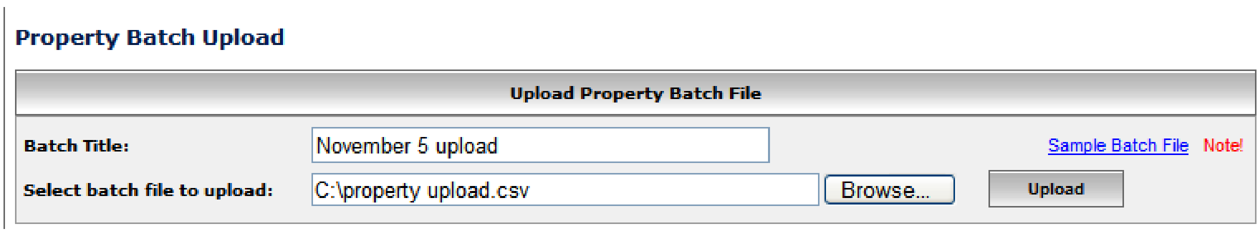
Batch upload files must be in an Excel .csv format. A sample batch file is provided, describing exactly what the file can contain. Address1, City, and State are required; all other fields are optional.

FILE_NUMBER	ADDRESS1	ADDRESS2	CITY	STATE	ZIP	PROPERTY_TYPE	AREA	LISTING_NUMBER	APN	YEAR_BUILT
CB112233	189 PROPERTY AVE	999	SUNNYVALE	CA	94086	APT	1200	L178299	A336699	1992
CB23789	111 Elcamino Real		SUNNYVALE	CA	94086	SFY	3900	L235678	A234567	
CB1123189	2523 Market St		San Jose	CA	94087	SFA				
CB23789	1899 Main St	189	Cupertino	CA	94085					
CB23789	989 South St		Sunnyvale	CA	94086		2700			

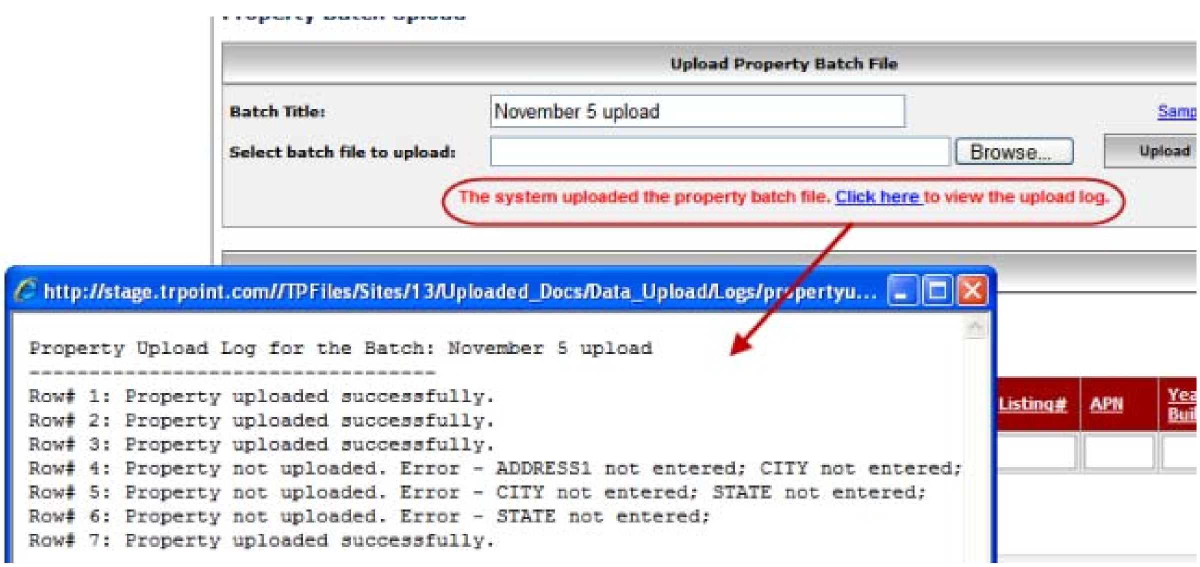
Clicking on the red triangle in the Property Type column will display a list of the acceptable Property Type codes.



To upload a file, enter the descriptive title of the file in the 'Batch Title' box, and the location of the file in the 'Select batch file to upload' box and click 'Upload.'



When the upload is complete, a link will appear to the Upload Log. The log will display results by spreadsheet rows, and indicate whether any errors occurred.



Managing Uploaded Files

There are three ways to view uploaded properties:

1. Display by descriptive title
2. Display all batch files
3. Search a file (or all files) by a filter.

To display by title, select the title of the desired file from the dropdown and all the uploaded properties will appear.

View Property Batch Details

Select a property batch to view: Test Property Batch1_10/27/2008

File#	Address	City	State	Zip	Property Type	Area	Listing#	APN	Year Built	Trans#	Delete
CB23789	111 Elcamino Real	SUNNYVALE	CA	94086		3900	L235678	A234567	1992	Create	X
CB112233	189 PROPERTY AVE 999	SUNNYVALE	CA	94086	Apartment	1200	L178299	A336699	1992	Create	X
CB23789	1899 Main St 189	Cupertino	CA	94085	Apartment	3900			1992	Create	X
CB1123189	2523 Market St	San Jose	CA	94087	Single Family Attached	3900			1992	Create	X
CB23789	989 South St	Sunnyvale	CA	94086	Condominium	2700			1992	Create	X

Page 1 of 1 (Total Properties: 5) [1]

To display all files, choose 'Show All' from the dropdown.

To search by a filter, enter the desired information in the filter box and select the desired file in the dropdown. For example, to select all properties with 'main' in the street name, enter 'main' in the address and choose 'Show All' in the dropdown.

View Property Batch Details

Select a property batch to view: - Show All -

File#	Address	City	State	Zip	Property Type	Area	Listing#	APN	Year Built	Trans#	Delete
	main										
TEST 39502	123 Main Street #200	Tampa	FL	33626	Single Family	350	U359860			Create	X
TEST2 39502	123 Main Street #200	Tampa	FL	33626	Single Family	3500	U359860	456-871-52	1956	11771-11249	X
TEST2 39502	123 Main Street #200	Tampa	FL	33626	Single Family	3500	U359860	456-871-52	1956	Create	X
CB23789	1899 Main St 189	Cupertino	CA	94085	Apartment	3900			1992	Create	X
CB23789	1899 Main St 189	Cupertino	CA	94085	Apartment	3900				Create	X

Page 1 of 1 (Total Properties: 5) [1]

Creating a Transaction from an Uploaded Property

To create a transaction from an uploaded property, click on the 'Create' link under the 'Trans#' column. The Property Details page will appear with the property information prefilled. Complete the transaction as usual. On the Property Batch Details page, the transaction number will appear in place of the 'Create' link. Click on the transaction number to go to the transaction.

Deleting a Property

To remove a property, click on the delete icon: X. A deleted property cannot be recovered; if a transaction has not been created, the property will not be available in the system. If a transaction has been created from the Property Upload, deleting it will remove it from the Property Upload only. Since creating the transaction adds the property to the Property Center, it can be found there.

Notification of Viewed Documents

Agents and transaction coordinators can now opt to receive a daily e-mail displaying, by transaction, documents that were viewed in the previous 24 hours. A new report is available that agents and coordinators can run to see who has viewed documents in a transaction.

Document Viewed E-mail

The agent and transaction coordinator profiles have been modified to include an option to receive a daily 'document viewed' e-mail that will list, by transaction, all documents viewed within the previous 24 hours. These e-mails will be sent during the overnight hours.

Transaction Coordinator Profile

Transaction coordinator profiles have been modified to request that Document Viewed E-Mails be sent. The box will be unchecked by default when a new coordinator is added.

Email 5 :

Set new document privilege to: ○ Public ◉ Private

Enable Calendar: ☑

Set default transaction tab to: ○ Summary ○ Contact ◉ Activity ○ Log

Enable Document Viewed E-Mail: ☑

Agent Profile

Agent profiles have also been modified to request 'Document Viewed' E-Mails. The box will be unchecked by default when a new agent is added.

Reports Notifications

Transaction Status Report Notification on: ☐ Select All ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday

Enable Document Viewed E-Mail: ☐

The Document Viewed E-Mail

Each transaction is listed separately, and displays viewing information only for documents that have been viewed within the 24-hour period shown on the e-mail.

From: service@stage.trpoint.com
to: docviewreport@stage.trpoint.com
date: 16 Dec 2008 02:00:28 -0800
subject: stage Environment - TransactionPoint documents viewed report within the 24 hour period of 12/15/2008

Dear John Doug,

The documents listed below were viewed in TransactionPoint within the 24 hour period of 12/15/2008.

Transaction# 11776-11254, Property Address:17 West End Road,Irvine,CA-92612					
Document Name	Upload Date	Viewed By	Date Time	Email	Phone
Listing	12/12/2008 11:04:57 AM (PST)	Darlene Potter	12/15/2008 8:21:12 AM (PST)	demotc@stage.trpoint.com	408-592-8952

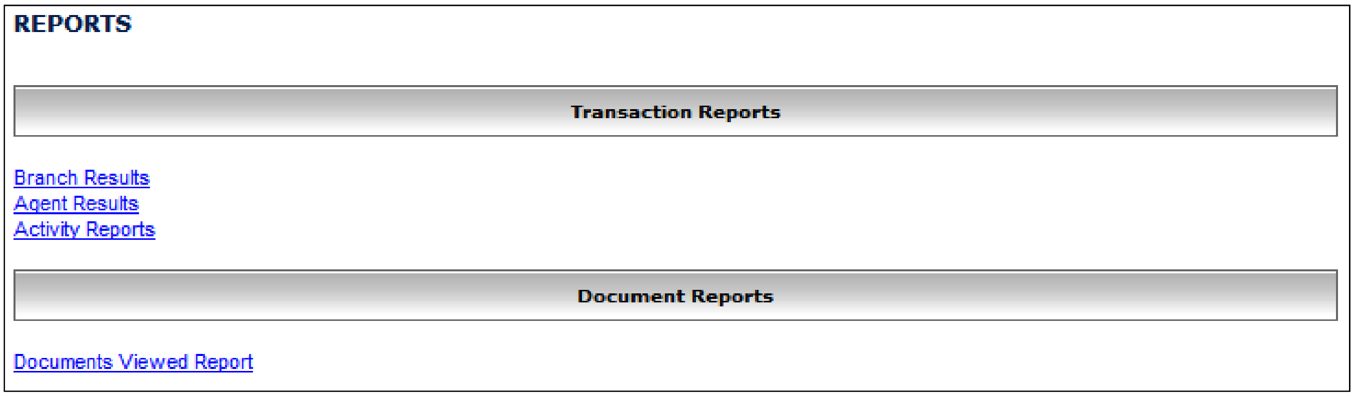
Click here to log into your site.

Document Viewed Report

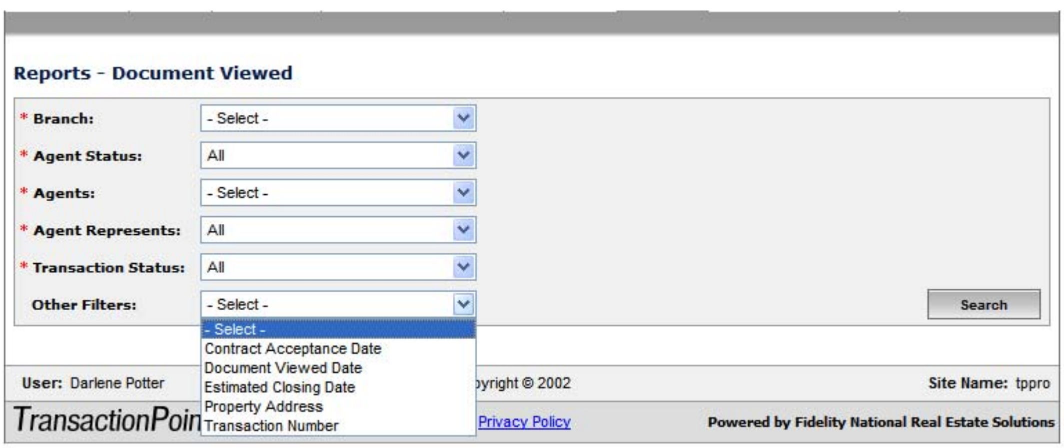
A report has been added titled 'Document Viewed Report.' Agents and transaction coordinators can search for files by multiple criteria.

A 'Document Reports' section has been added to the agent's view on the Reports tab. (It is already available for the transaction coordinator and also displays the Documents Received Report.)

The 'Documents Viewed Report' is available to Agents and Transaction Coordinators. The example below is the agent's view.



When the user clicks on 'Document Viewed Report', a search screen opens. If the user is an agent, 'Branch,' 'Agent Status' and 'Agent' will not appear. Technical considerations at this time preclude the option to search for viewed documents for all branches or all agents within a branch.



The resulting report displays the results by transaction and contains the transaction number and property information. The report details can be exported to a PDF or Excel file by first expanding the desired transaction(s) and clicking the appropriate 'Export' button.

Clicking on the plus sign displays all documents in that transaction that meet the search criteria. All transactions can be expanded at the same time by selecting 'Expand All Transactions.'

Reports - Document Viewed

⊟ **Transaction 11776-11254 (17 West End Road, Irvine, CA 92612)**

Document Name	Upload Date	Viewed By	Viewed Date	Email	Phone
4 pgs	Dec 11 2008 2:08PM	Darlene Potter	Dec 11 2008 2:08PM	demotc@stage.trpoint.com	408-592-8952
5 pgs	Dec 11 2008 2:08PM	Darlene Potter	Dec 11 2008 2:09PM	demotc@stage.trpoint.com	408-592-8952
8 pgs	Dec 11 2008 2:08PM	Darlene Potter	Dec 11 2008 2:09PM	demotc@stage.trpoint.com	408-592-8952
contract 73 kb	Dec 11 2008 2:07PM	Darlene Potter	Dec 11 2008 2:08PM	demotc@stage.trpoint.com	408-592-8952
Residential Purchase Agreement	Dec 11 2008 8:27AM	10.195.69.20	Dec 11 2008 11:29AM	QZHVYFDA	
Special subdivision disclosure required by the CDD	Dec 11 2008 7:56AM	10.195.69.20	Dec 11 2008 11:29AM	QZHVYFDA	
Special subdivision disclosure required by the CDD	Dec 11 2008 7:56AM	Darlene Potter	Dec 11 2008 7:57AM	demotc@stage.trpoint.com	408-592-8952

⊞ **Transaction 3140-3372 (18009 Norwalk B , Artesia, CA 90701)**

⊞ **Transaction 3755-3984 (3000 miles to graceland , honolulu, HI 96814)**