

# Transaction Coordinator's Guide

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v14.0

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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)
  - Manage 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
- Manage 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
- Manage 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
- Manage 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:

**TransactionPoint™**

Welcome to TransactionPoint April 30, 2009

[Login](#) [View Transaction Docs](#) [Find An Agent](#) [Contact Us](#)

User ID:

Password:

Remember my password

[Forgot your password](#)

[Review documents for a specific transaction](#)

Increase Font Size

**About:**  
**FNRES Realty**

**THE POWER TO CLOSE MORE DEALS, MORE EFFECTIVELY,  
RIGHT AT YOUR FINGERTIPS.**

What if you could improve profitability, increase efficiency and manage risk more effectively with a single solution? It's all possible with **TransactionPoint**—the most powerful transaction management platform in the industry.

**TransactionPoint Benefits:**

- A web-based platform that allows access 24/7
- Automates the entire real estate transaction from listing a property to closing the deal
- Easily create new transactions from AgentOffice and popular forms products such as ZipForm®/WINForms® and AutoRealty.
- Provides a secure document repository with documents easily posted via fax, scanner, email, printer driver or direct upload.
- Reduces liability risk by adhering to a consistent process with background logging of key events and communications
- Archive transaction(s) onto CDs for clients or company records

**Media Options:**

[Click Here To View a PowerPoint presentation.](#)

[Click Here To Listen to a Product Overview.](#)

[Click Here To View a Product Overview.](#)

**For More Information:**

Call 866.617.5496 option 3 or [E-mail us.](#)

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

**Transaction Center**

Submit a New Transaction:

Transaction Coordinator: Coordinator, Claire

Branch: FNRES Realty Agent: (\* InActive Agents) Show All

Agent Represents: Show All Status: Pending With: Show All Approval Status: Show All

Other Filters: Property Address

---

**Transaction Search Results**

Total Transactions: 2

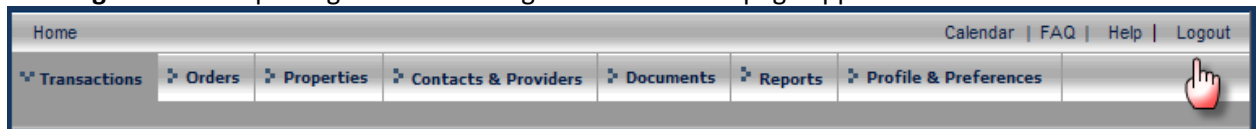
Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date	
<a href="#">6707-6910</a>	22 Millburrow Lane Frisco, TX 75035	Pending	Semore, Stacey	123456789	(S) Shaw, Brad	04/14/2009	<input type="checkbox"/>
<a href="#">5973-6178</a>	711 Arrowhead Tr Warner Robins, GA 31088	Pending	Semore, Stacey		(B) Grey, Brandon	05/21/2009	<input type="checkbox"/>

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

Total Transactions: 2

## 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.

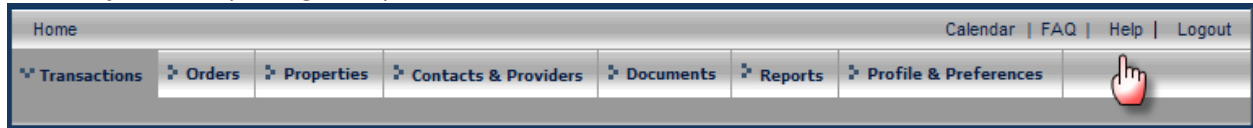


## Getting Help

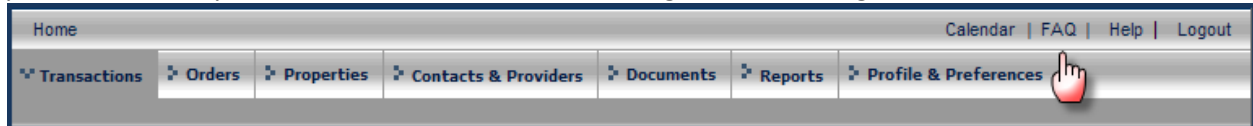
The **HELP** section contains the following useful information:

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**.

The screenshot displays the 'Transaction Center' interface. At the top, there is a section titled 'Submit a New Transaction:' with a 'Create Transaction' button highlighted by a red circle. Below this, there are buttons for 'Assist a TC' and 'Print Page'. The main area shows the 'Transaction Coordinator: Coordinator, Claire' with a 'Save Settings' button. Below this, there are several filter sections: 'Branch:' with a dropdown menu showing 'FNRES Realty'; 'Agent: (\* InActive Agents)' with a dropdown menu showing 'Show All'; 'Agent Represents:' with a dropdown menu showing 'Show All'; 'Status:' with a dropdown menu showing 'Pending'; 'With:' with a dropdown menu showing 'Show All'; and 'Approval Status:' with a dropdown menu showing 'Show All'. At the bottom, there is an 'Other Filters:' section with a dropdown menu showing 'Property Address' and a 'Search' button.



# Transaction Summary

Home   Mail	Calendar   FAQ   Help   Logout		
<span>Transactions</span>   <span>Orders</span>   <span>Properties</span>   <span>Contacts &amp; Providers</span>   <span>Documents</span>   <span>Reports</span>   <span>Profile &amp; Preferences</span>			
Property Address:  Listing Price: \$ Sales Price: \$ Year Built/Approximate Age: MLS No.	Transaction ID: Represents/Status: Contract Acceptance Date: Seller(s): Seller's Agent: APN No.	Escrow/Closing No. Escrow/Closing: Estimated Closing Date: Buyer(s): Buyer's Agent: File No.	
Transaction Summary	Transaction Contacts	Activities/Orders/Docs	Communication Log

**Transaction Details**

Save

Save/Next

\*Agent:

Private Contact     Allow Full Access  
(Note: Agent represents SELLER for Dual Agency Transaction)

\*Agent Represents:

(mm/dd/yyyy)

Status:

(mm/dd/yyyy)

\*Sales Type:

Listing Date:

(mm/dd/yyyy)

Listing Expiration Date:

(mm/dd/yyyy)

Contract Acceptance Date:

(mm/dd/yyyy)

Days to Estimated Closing Date:

(mm/dd/yyyy)

Estimated Closing Date:

(mm/dd/yyyy)

Escrow Closing Date:

(mm/dd/yyyy)

Listing Price:

Sale Price:

Loan Type:

Loan Amount:

File Number:

(mm/dd/yyyy)

Escrow/Closing No.:

Title No.:

Cancellation Date:

**Property Details**

\*Type:

Yr. Built:  Age:

\*Address 1:

MLS Board:

Address 2:

MLS #:

\*City:  \*State:

Zip:  -  (Additional 4 digits optional)

APN:

Area:  Sq. ft.

+ **Additional Property Details**

+ **Home Owners Association**

Save

Save/Next



## 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
Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date	
<a href="#">6560-6763</a> *	4564653 McKinney, TX 75070	Pre-Sale	Agent, Andrew				<input type="checkbox"/>
<a href="#">6707-6910</a>	22 Millburrow Lane Frisco, TX 75035	Pending	Semore, Stacey	123456789	(S) Shaw, Brad	04/14/2009	<input type="checkbox"/>
<a href="#">5973-6178</a>	711 Arrowhead Tr Warner Robins, GA 31088	Pending	Semore, Stacey		(B) Grey, Brandon	05/21/2009	<input type="checkbox"/>
* You have been given access to this transaction by the owner							<input type="checkbox"/>

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

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

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

\*Agent Represents:  Status:  \*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**.

- Listing Date
- Listing Expiration Date
- Contract Acceptance Date
- Days to Estimated Closing
- Estimated Closing Date
- Escrow Closing Date
- Listing Price
- Sale Price
- Loan Type
- Loan Amount
- File Number
- Escrow/Closing Number
- Title Number
- Cancellation Date

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

### Property Details

The **Property Details** section

Property Details	
*Type: <input type="text" value="- Select Property Type -"/>	Yr. Built: <input type="text"/> Age: <input type="text"/>
*Address 1: <input type="text"/>	MLS Board: <input type="text" value="Unknown Board"/>
Address 2: <input type="text"/>	MLS #: <input type="text"/>
*City: <input type="text"/> *State: <input type="text" value="TX"/>	
Zip: <input type="text"/> - <input type="text"/> (Additional 4 digits optional)	APN: <input type="text"/>
<input type="button" value="Property Search"/>	<input type="button" value="APN Search"/>
Area: <input type="text"/> Sq. ft.	



**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**

Transaction Summary	Transaction Contacts	Activities/Orders/Docs	Communications Log
<b>Transaction Contacts</b> <span>Save</span> <span>Save/Next &gt;</span>			
Transaction Coordinator: Coordinator, Daire			
Buyer's Agent: Agent, Andrew			
Contact Type: <b>Buyer</b> <span>Find Contact</span>			
First Name: <input type="text"/> Middle: <input type="text"/> Last Name: <input type="text"/>			
Company Name: <input type="text"/> <input type="checkbox"/> Private Contact			
Mail Address <input type="checkbox"/> Use address on transaction			
Address 1: <input type="text"/>			
Address 2: <input type="text"/>			
City: <input type="text"/> State: <input type="text"/> ZIP: <input type="text"/>			
Country: <input type="text" value="USA"/> <input type="text"/>			
Email: <input type="text"/>			
Home: <input type="text"/>			
Work: <input type="text"/>			
Fax: <input type="text"/>			
Mobile: <input type="text"/>			
Delivery Preference: <input type="text" value="None"/> <input type="text"/>			
Contact Type: <b>Seller</b> <span>Find Contact</span>			
First Name: <input type="text"/> Middle: <input type="text"/> Last Name: <input type="text"/>			
Company Name: <input type="text"/> <input type="checkbox"/> Private Contact			
Mail Address <input type="checkbox"/> Use address on transaction <input type="checkbox"/> Use above address			
Address 1: <input type="text"/>			
Address 2: <input type="text"/>			
City: <input type="text"/> State: <input type="text"/> ZIP: <input type="text"/>			
Country: <input type="text" value="USA"/> <input type="text"/>			
Email: <input type="text"/>			
Home: <input type="text"/>			
Work: <input type="text"/>			
Fax: <input type="text"/>			
Mobile: <input type="text"/>			
Delivery Preference: <input type="text" value="None"/> <input type="text"/>			
Contact Type: <b>Seller's Agent</b> <span>Find Contact</span>			
First Name: <input type="text"/> Middle: <input type="text"/> Last Name: <input type="text"/>			
Company Name: <input type="text"/> <input type="checkbox"/> Private Contact			
Mail Address <input type="checkbox"/> Use above address			
Address 1: <input type="text"/>			
Address 2: <input type="text"/>			
City: <input type="text"/> State: <input type="text"/> ZIP: <input type="text"/>			
Country: <input type="text" value="USA"/> <input type="text"/>			
Email: <input type="text"/>			
Home: <input type="text"/>			
Work: <input type="text"/>			
Fax: <input type="text"/>			
Mobile: <input type="text"/>			
Delivery Preference: <input type="text" value="None"/> <input type="text"/>			
Contact Type: <b>COOP-IC</b> <span>Find Contact</span>			
First Name: <input type="text"/> Middle: <input type="text"/> Last Name: <input type="text"/>			
Company Name: <input type="text"/> <input type="checkbox"/> Private Contact			
Mail Address <input type="checkbox"/> Use Seller's Agent address <input type="checkbox"/> Use Buyer's Agent address			
Address 1: <input type="text"/>			
Address 2: <input type="text"/>			
City: <input type="text"/> State: <input type="text"/> ZIP: <input type="text"/>			
Country: <input type="text" value="USA"/> <input type="text"/>			
Email: <input type="text"/>			
Home: <input type="text"/>			
Work: <input type="text"/>			
Fax: <input type="text"/>			
Mobile: <input type="text"/>			
Delivery Preference: <input type="text" value="None"/> <input type="text"/>			
Contact Type: <b>Closing/Escrow Provider</b>			
Preferred Provider: No Preferred Providers Exist. Please Select Other Provider. <span>Select Other</span>			
Contact Type: <b>Title</b>			
Preferred Provider: No Preferred Providers Exist. Please Select Other Provider. <span>Select Other</span>			
Contact Type: <b>Lender</b>			
Preferred Provider: No Preferred Providers Exist. Please Select Other Provider. <span>Select Other</span>			
Contact Type: <b>Home Warranty</b>			
Preferred Provider: <input type="text" value="- Select -"/> <input type="text"/> <input type="checkbox"/> Private Contact <span>Select Other</span>			
Contact Type: <b>Inspector - Home Inspection</b>			
Preferred Provider: <input type="text" value="- Select -"/> <input type="text"/> <input type="checkbox"/> Private Contact <span>Select Other</span>			
Contact Type: <b>Inspector - Termite Inspection</b>			
Preferred Provider: No Preferred Providers Exist. Please Select Other Provider. <span>Select Other</span>			
<span>Save</span> <span>Save/Next &gt;</span>			

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	
<b>Key Dates</b>							
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	<input type="text" value="7"/>	<input type="checkbox"/>	After	Contract Acceptance Date	5/21/2009		
Property Condition Contingency	<input type="text" value="10"/>	<input type="checkbox"/>	After	Contract Acceptance Date	5/24/2009		
Financing Contingency Removal	<input type="text" value="10"/>	<input type="checkbox"/>	After	Contract Acceptance Date	5/24/2009		
Title Contingency	<input type="text" value="10"/>	<input type="checkbox"/>	After	Contract Acceptance Date	5/24/2009		
HOA Documents Contingency	<input type="text"/>	<input type="checkbox"/>	After	Contract Acceptance Date	<input type="text"/>		
Appraisal Contingency Removal	<input type="text"/>	<input type="checkbox"/>	After	Contract Acceptance Date	<input type="text"/>		
Contingent Sale (buyer's home) Contingency	<input type="text"/>	<input type="checkbox"/>	After	Contract Acceptance Date	<input type="text"/>		
Visual Inspection Contingency	<input type="text"/>	<input type="checkbox"/>	After	Contract Acceptance Date	<input type="text"/>		
All Contingencies Removed Date	<input type="text" value="17"/>	<input type="checkbox"/>	After	Contract Acceptance Date	5/31/2009		
Possession Date	<input type="text"/>	<input type="checkbox"/>	After	Contract Acceptance Date	<input type="text"/>		
Estimated Closing Date	<input type="text"/>	<input type="checkbox"/>	After	Contract Acceptance Date	6/28/2009		
Estimated Closing Date Per Contract	<input type="text" value="30"/>	<input type="checkbox"/>	After	Contract Acceptance Date	6/13/2009		
<b>Activity Selection</b>							
Please select one of the activity templates below to generate activity list:							
<input checked="" type="radio"/> Master Activity List							
<b>Activity Templates:</b>							
<input type="radio"/> Buyer Checklist w REQ Activities							
<input type="button" value="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	<input type="checkbox"/>	After Contract Acceptance Date	5/21/2009
Property Condition Contingency	10	<input type="checkbox"/>	After Contract Acceptance Date	5/24/2009
Financing Contingency Removal	10	<input type="checkbox"/>	After Contract Acceptance Date	5/24/2009
Title Contingency	10	<input type="checkbox"/>	After Contract Acceptance Date	5/24/2009
HOA Documents Contingency		<input type="checkbox"/>	After Contract Acceptance Date	
Appraisal Contingency Removal		<input type="checkbox"/>	After Contract Acceptance Date	
Contingent Sale (buyer's home) Contingency		<input type="checkbox"/>	After Contract Acceptance Date	
Visual Inspection Contingency		<input type="checkbox"/>	After Contract Acceptance Date	
All Contingencies Removed Date	17	<input type="checkbox"/>	After Contract Acceptance Date	5/31/2009
Possession Date		<input type="checkbox"/>	After Contract Acceptance Date	
Estimated Closing Date		<input type="checkbox"/>	After Contract Acceptance Date	6/28/2009
Estimated Closing Date Per Contract	30	<input type="checkbox"/>	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.

**Activity Selection**

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

Master Activity List

**Activity Templates:**

Buyer Checklist w REQ Activities

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.

Transaction Summary		Transaction Contacts		Activities/Orders/Docs		Communication Log	
<b>+ Key Dates</b> <span style="float: right;">Print</span>							
<b>- Activities</b> <span style="float: right;">Post to Top Producer</span> <span style="float: right;">Print</span>							
Filter by Task Type:		Show All					
Filter by Task Status:		Show All				Save Settings	
GO TO BOTTOM		Add Template Activities		Add Master Activities			
Update	Remove	Fax Cover	Send to Outlook	Completed Date		Insert	
Priority	Activity	Due		Completed	Log	Orders	Docs
<input type="checkbox"/>	Commission Instructions	05/14/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Contract to Lender	05/14/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Deliver Contract	05/14/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Earnest Money	05/14/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Pending on MLS	05/14/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Deposit earnest money	05/15/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Home Inspection	05/15/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Loan application	05/15/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Termite inspection	05/15/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Well and/or Septic Tank inspection	05/15/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Appraisal	05/16/2009		<input type="checkbox"/>			
<input type="checkbox"/>	All inspection reports	05/21/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Documents to Closing Company	05/21/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Set up closing time	05/21/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Amendment for Repairs - Offer	05/24/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Amendment for Repairs - Accept	05/28/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Loan progress	05/28/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Accept Repair Counter - Last chance!	05/29/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Home Warranty desired	06/14/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Homeowner's Insurance	06/14/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Closing reminder	06/21/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Loan approval	06/21/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Certified funds	06/27/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Final walkthrough	06/27/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Home Warranty	06/27/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Prepare for closing	06/27/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Closing	06/28/2009		<input type="checkbox"/>			
<input type="checkbox"/>	Remove Lockbox	06/28/2009		<input type="checkbox"/>			
<input type="checkbox"/>	General Documents and Orders			<input type="checkbox"/>			
Update	Remove	Fax Cover	Send to Outlook	Completed Date		Insert	
GO TO TOP		Add Template Activities		Add Master Activities			
<small>Note: Due/Past due activities are shown in red.</small>							
<b>+ Orders</b>							
<b>+ Transaction Documents</b>							
<b>+ Inbox Documents</b>							



## Essential Tasks

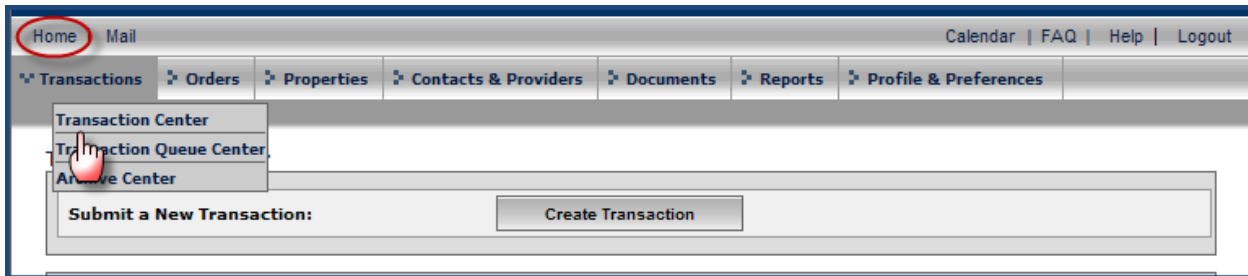
### Transaction Center

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

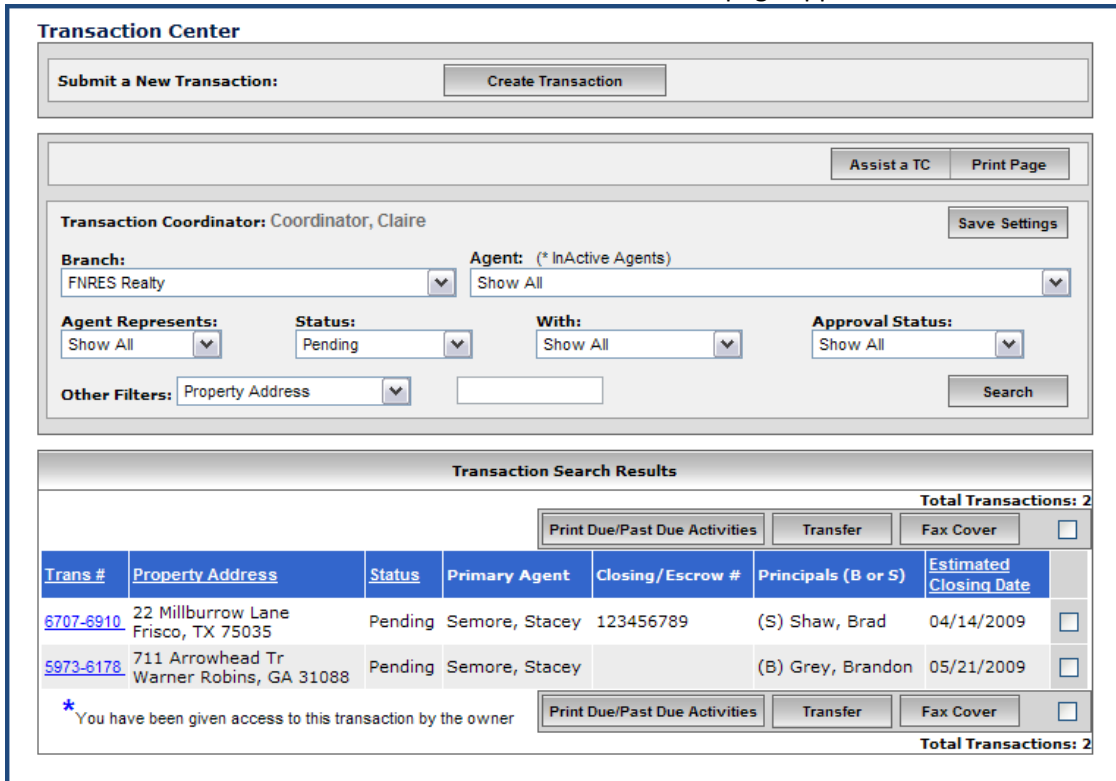
1. Create Transactions
2. Assist another Transaction Coordinator with their transactions
3. Search for transactions
4. View / Access your transactions
5. Print Due/Past Due activities
6. Transfer files to another Transaction Coordinator
7. Print Fax Coversheets for your displayed transactions

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.



**Transaction Center**

Submit a New Transaction:

Assist a TC

Transaction Coordinator: Coordinator, Claire

Branch: FNRES Realty Agent: (\* InActive Agents) Show All

Agent Represents: Show All Status: Pending With: Show All Approval Status: Show All

Other Filters: Property Address

**Transaction Search Results**

Total Transactions: 2

Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date	
<a href="#">6707-6910</a>	22 Millburrow Lane Frisco, TX 75035	Pending	Semore, Stacey	123456789	(S) Shaw, Brad	04/14/2009	<input type="checkbox"/>
<a href="#">5973-6178</a>	711 Arrowhead Tr Warner Robins, GA 31088	Pending	Semore, Stacey		(B) Grey, Brandon	05/21/2009	<input type="checkbox"/>

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

Total Transactions: 2

## 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.

### Transaction Center

Submit a New Transaction:

Transaction Coordinator: Coordinator, Claire

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

Agent Represents:  Status: Pending  With:  Approval Status:

Other Filters: Property Address

---

### Transaction Search Results

Total Transactions: 2

Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date	
<a href="#">6707-6910</a>	22 Millburrow Lane Frisco, TX 75035	Pending	Semore, Stacey	123456789	(S) Shaw, Brad	04/14/2009	<input type="checkbox"/>
<a href="#">5973-6178</a>	711 Arrowhead Tr Warner Robins, GA 31088	Pending	Semore, Stacey		(B) Grey, Brandon	05/21/2009	<input type="checkbox"/>

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

Total Transactions: 2

## 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.

**Transaction Center**

Submit a New Transaction:

---

Transaction Coordinator: Shaw, Karalie

Branch:  Agent: (\* InActive Agents)

Agent Represents:  Status:  With:

Other Filters:

---

**Transaction Search Results**

Total Transactions : 3

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

Total Transactions : 3

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

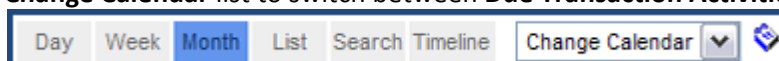
The **Calendar** feature of TransactionPoint allows you to view your Key Dates and activities by the day, by the week or by the month. You may also search for activities and add Events to your calendar. Calendars may be exported for convenience.

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.

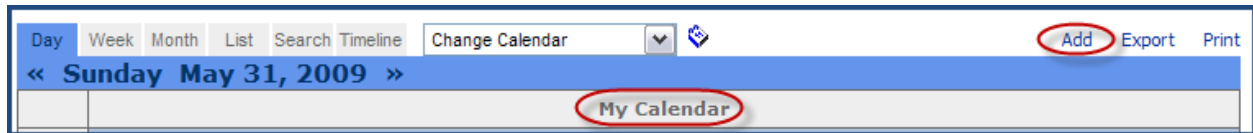
Day	Week	Month	List	Search	Timeline	Change Calendar	Export	Print
«		May 2009	»		<b>Due Transaction Activities</b>			
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday		
26	27	28	29	30	1	2		
					6996-7199: 2219 56th Avenue NW, Frisco, TX 75035 (Key Date)			
3	4	5	6	7	8	9		
10	11	12	13	14	15	16		
				6996-7199: 2219 56th Avenue NW, Frisco, TX 75035 (Key Date)	6996-7199: 2219 56th Avenue NW, Frisco, TX 75035 (Activity Due)	6996-7199: 2219 56th Avenue NW, Frisco, TX 75035 (Activity Due)		
				6996-7199: 2219 56th Avenue NW, Frisco, TX 75035 (Activity Due)				
17	18	19	20	21	22	23		
				6996-7199: 2219 56th Avenue NW, Frisco, TX 75035 (Key Date)	6707-6910: 22 Millburrow Lane, Frisco, TX 75035 (Activity Due)			
				6996-7199: 2219 56th Avenue NW, Frisco, TX 75035 (Activity Due)				
24	25	26	27	28	29	30		
6996-7199: 2219 56th Avenue NW, Frisco, TX 75035 (Key Date)		7042-7245: 2119 Thompson Road, Frisco, TX 75035 (Key Date)	7042-7245: 2119 Thompson Road, Frisco, TX 75035 (Activity Due)	6996-7199: 2219 56th Avenue NW, Frisco, TX 75035 (Activity Due)	6996-7199: 2219 56th Avenue NW, Frisco, TX 75035 (Activity Due)			
6996-7199: 2219 56th Avenue NW, Frisco, TX 75035 (Activity Due)		7042-7245: 2119 Thompson Road, Frisco, TX 75035 (Activity Due)						
31	1	2	3	4	5	6		
6996-7199: 2219 56th Avenue NW, Frisco, TX 75035 (Key Date)		7042-7245: 2119 Thompson Road, Frisco, TX 75035 (Activity Due)						

**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

A screenshot of the 'New Event' form. The form is divided into two columns. The left column contains fields for 'Title' (text input), 'Date' (Month: May, Day: 31, Year: 2009), 'Time' (6 am, :00), 'Type' (Timed), and 'Duration' (0 days, 1 hr, 0 mins). The right column contains fields for 'Color' (dropdown), 'Repeat' (dropdown), 'Description' (text area), 'Email Reminder' (1 hr before), and a list of email addresses (connie.shaw@fnres.com). At the bottom right are 'OK' and 'Cancel' buttons.

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

A screenshot of the 'Event Details' screen. At the top right are links for 'Edit', 'Delete', 'Print', and 'Close'. The event information is displayed as follows:  
**Title:** Collect Earnest Money Receipt from Jan  
**Calendar:** My Calendar  
**Date:** June 1, 2009  
**Time:** 10:00 AM - 11:00 AM (1 hr)  
**Description:** Collect monies owed for Jan's deals.

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**.

Day	Week	Month	List	Search	Timeline	Add	Export	Print
Searched for All Calendars; May 31, 2009 - Jun 8, 2009; Sort By: Date						Search Again		
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

### Export current items

Excel

XML

iCalendar

**Note:** The iCalendar option will be used to Export your transaction activities and personal events to Outlook and Outlook Express.

**Instructions to use iCalendar option:**

1. Select iCalendar option and click OK button.
2. From the "File Download" box select "Save".
3. Choose where to save the document (i.e. your Desktop or My Documents.)
4. Click "Save".
5. Open Outlook or Outlook Express.
6. Choose "File", then Import and Export.
7. From the Import and Export wizard box, select Import an iCalendar or vCalendar file (.vcs).
8. Click on "Next".
9. Browse for the File Name.
10. Highlight and click "Open".
11. Activities and events will now be placed in your Outlook calendar.

OK Cancel

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.

Transaction Search Results							Total Transactions: 4
<input type="button" value="Print Due/Past Due Activities"/> <input type="button" value="Transfer"/> <input type="button" value="Fax Cover"/>						<input type="checkbox"/>	
Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date	
<a href="#">7042-7245</a>	2119 Thompson Road Frisco, TX 75035	Pending	Agent, Andrew		(B) Richards, Ron		<input type="checkbox"/>
<a href="#">5801-6006</a>	319 Haverhill Circle Building 1 Warner Robins, GA 31088	Pending	Agent, Andrew		(B) Cassidy, Becki	12/08/2007	<input type="checkbox"/>
<a href="#">6445-6648</a> <b>New!</b>	2209 Miller Game Lane McKinney, TX 75070	Pending	Agent, Andrew		(B) Baker, Grace	03/26/2008	<input checked="" type="checkbox"/>
<a href="#">6996-7199</a>	2219 56th Avenue NW Frisco, TX 75035	Pending	Agent, Andrew	09-156198	(B) Buyer, Charles	06/28/2009	<input type="checkbox"/>
* You have been given access to this transaction by the owner							
<input type="button" value="Print Due/Past Due Activities"/> <input type="button" value="Transfer"/> <input type="button" value="Fax Cover"/>						<input type="checkbox"/>	
							Total Transactions: 4

**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.

Transfer Transaction(s)							
<b>Note:</b> When multiple transactions are selected, the transfer to dropdown list will only display Transaction Coordinators.							
From:	Claire Coordinator						
To:	<input type="text" value="-- Select --"/>						
Please select the transactions below:							
Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing	Select
<a href="#">6445-6648</a>	2209 Miller Game Lane McKinney, TX 75070	Pending	Agent, Andrew		(B) Baker, Grace	3/26/2008	<input checked="" type="checkbox"/>
							Total Transactions: 1
** Full Access Agent							
*** You do not have permission to transfer this transaction							
<input type="button" value="Transfer"/>				<input type="button" value="Cancel"/>			



To: -- Select --

-- Select --

- Agent, Andrew (FNRES Realty) \*\*
- Christian, Lacy (FNRES Realty - Shaw Team)
- Coordinator, Sally (FNRES Realty)
- Stemmons, Rick (FNRES Realty)

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.

**Transfer Transaction(s)**

**Transaction(s) transferred successfully.**

[Close](#)

Transaction Search Results							Total Transactions: 4
Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date	
<a href="#">7042-7245</a>	2119 Thompson Road Frisco, TX 75035	Pending	Agent, Andrew		(B) Richards, Ron		<input type="checkbox"/>
<a href="#">5801-6006</a>	319 Haverhill Circle Building 1 Warner Robins, GA 31088	Pending	Agent, Andrew		(B) Cassidy, Becki	12/08/2007	<input type="checkbox"/>
<a href="#">6445-6648</a> <b>New!</b>	2209 Miller Game Lane McKinney, TX 75070	Pending	Agent, Andrew		(B) Baker, Grace	03/26/2008	<input checked="" type="checkbox"/>
<a href="#">6996-7199</a>	2219 56th Avenue NW Frisco, TX 75035	Pending	Agent, Andrew	09-156198	(B) Buyer, Charles	06/28/2009	<input type="checkbox"/>

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

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

## Transfer Denied

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

Home | Mail FAQ | Help | Logout

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

### Transfer Transaction(s)

**From:** William Atkins  
**To:**

**Please select the transactions below:**

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

**Total Transactions: 1**

\*\*\* You do not have permission to transfer this transaction

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.

The screenshot shows the Transaction Center interface. At the top right, there are buttons for "Assist a TC" (highlighted in yellow) and "Print Page". Below this, the "Transaction Coordinator" is set to "Coordinator, Claire" with a "Save Settings" button. The "Branch" is set to "FNRES Realty" and the "Agent" is set to "Show All". There are four filter dropdowns: "Agent Represents" (Show All), "Status" (Pending), "With" (Show All), and "Approval Status" (Show All). An "Other Filters" section includes "Property Address" and a search button. Below the filters is a "Transaction Search Results" section. It shows "Total Transactions: 3" and buttons for "Print Due/Past Due Activities", "Transfer", and "Fax Cover". A table lists three transactions:

Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date	
<a href="#">6707-6910</a>	22 Millburrow Lane Frisco, TX 75035	Pending	Semore, Stacey	123456789	(S) Shaw, Brad	04/14/2009	<input type="checkbox"/>
<a href="#">5973-6178</a>	711 Arrowhead Tr Warner Robins, GA 31088	Pending	Semore, Stacey		(B) Grey, Brandon	05/21/2009	<input type="checkbox"/>
<a href="#">6996-7199</a>	2219 56th Avenue NW Frisco, TX 75035	Pending	Agent, Andrew	09-156198	(B) Buyer, Charles	06/28/2009	<input type="checkbox"/>

Below the table, there is a note: "\* You have been given access to this transaction by the owner" and another set of buttons for "Print Due/Past Due Activities", "Transfer", and "Fax Cover". The "Total Transactions: 3" is repeated at the bottom right.

3. Click **Assist a TC**.

The **Assist a TC** page appears

The screenshot shows the "Assist a TC" page. It has a title bar "Assist a TC". Below it, the "Transaction Coordinator" is set to "Christian, Lacy (FNRES Realty - Shaw Team)". There is a "Password:" label and an empty text input field. At the bottom, there are "Submit" and "Cancel" buttons.

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.

**Transaction Coordinator:** Christian, Lacy

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

**Agent Represents:**  **Status:** Pending  **With:**  **Approval Status:**

**Other Filters:** Property Address

---

**Transaction Search Results**

**Total Transactions: 3**

Trans #	Property Address	Status	Primary Agent	Closing/ Escrow #	Principals (B or S)	Estimated Closing Date	
<a href="#">7042-7245</a>	2119 Thompson Road Frisco, TX 75035	Pending	Agent, Andrew		(B) Richards, Ron		<input type="checkbox"/>
<a href="#">6433-6636</a>	22 Michelson Drive Frisco, TX 75035	Pending	Agent, Andrew		(B) Buyer, Ben	03/06/2008	<input type="checkbox"/>
<a href="#">5973-6178</a>	711 Arrowhead Tr Warner Robins, GA 31088	Pending	Semore, Stacey		(B) Grey, Brandon	05/21/2009	<input type="checkbox"/>

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

**Total Transactions: 3**

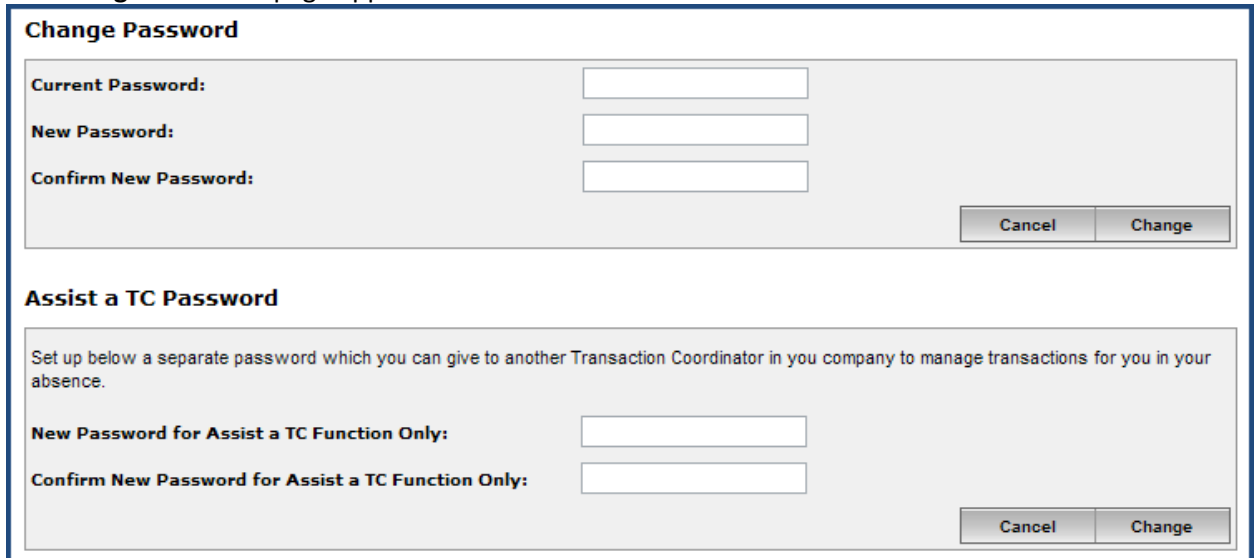
In this example the transaction coordinator owning these transactions is Lacy Christian (displayed in red) and the assisting coordinator is Claire TC.

**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.



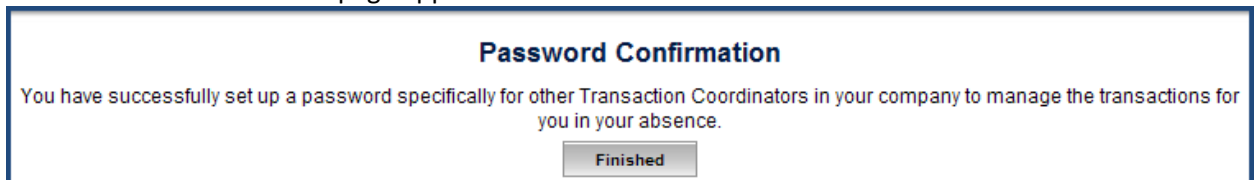
The screenshot shows two sections of a web form. The top section is titled "Change Password" and contains three input fields: "Current Password:", "New Password:", and "Confirm New Password:". To the right of these fields are two buttons: "Cancel" and "Change". The bottom section is titled "Assist a TC Password" and contains a descriptive paragraph: "Set up below a separate password which you can give to another Transaction Coordinator in you company to manage transactions for you in your absence." Below this paragraph are two input fields: "New Password for Assist a TC Function Only:" and "Confirm New Password for Assist a TC Function Only:". To the right of these fields are two buttons: "Cancel" and "Change".

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.



The screenshot shows a "Password Confirmation" page. At the top, the title "Password Confirmation" is centered. Below the title is a message: "You have successfully set up a password specifically for other Transaction Coordinators in your company to manage the transactions for you in your absence." At the bottom center of the page is a button labeled "Finished".

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.

Transaction Search Results							Total Transactions: 1
Trans #	Property Address	Status	Primary Agent	Closing/Escrow #	Principals (B or S)	Estimated Closing Date	
<a href="#">7111-7314</a>	52 Pickering Court McKinney, TX 75070	Pre-Sale	Moore, Simon				
							<input type="checkbox"/>
* You have been given access to this transaction by the owner							

Buttons: Print Due/Past Due Activities, Transfer, Fax Cover

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.

**Warning !**

The Transaction and all its associated information will be permanently removed from the system.

Do you want to Proceed?

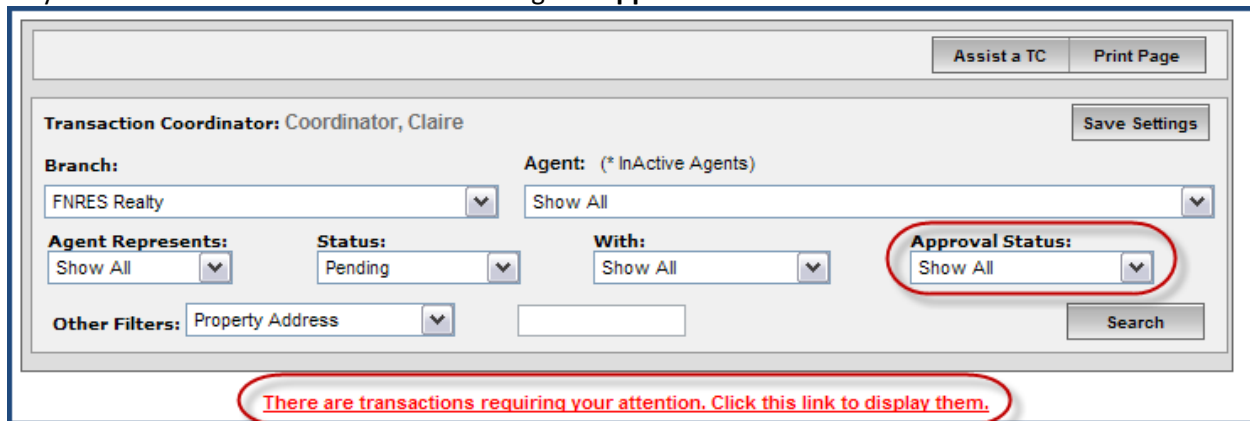
Click **Yes** to confirm you wish to remove the file permanently from the system. Click **No** to cancel.

**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.



Transaction Coordinator: Coordinator, Claire Save Settings

Branch: FNRES Realty Agent: (\* InActive Agents) Show All

Agent Represents: Show All Status: Pending With: Show All **Approval Status: Show All**

Other Filters: Property Address  Search

**There are transactions requiring your attention. Click this link to display them.**

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.

Priority	Activity	Due	Completed	Log	Orders	Docs
<input type="checkbox"/>	1 HOA Package Sent to Buyer for Approval	11/04/2007	<input type="checkbox"/>			
<input type="checkbox"/>	HOA Package Ordered	11/04/2007	<input type="checkbox"/>			
<input type="checkbox"/>	Signed Loan Documents Sent to Lender	11/04/2007	<input type="checkbox"/>			
<input type="checkbox"/>	HOA Package Sent to Buyer for Approval	11/09/2007	<input type="checkbox"/>			
<input type="checkbox"/>	Deposit Check Received		<input type="checkbox"/>			
<input type="checkbox"/>	General Documents and Orders		<input type="checkbox"/>			

Update Remove Fax Cover Send to Outlook Completed Date  Insert

GO TO TOP Add Template Activities Add Master Activities

Note: Due/Past due activities are shown in red.

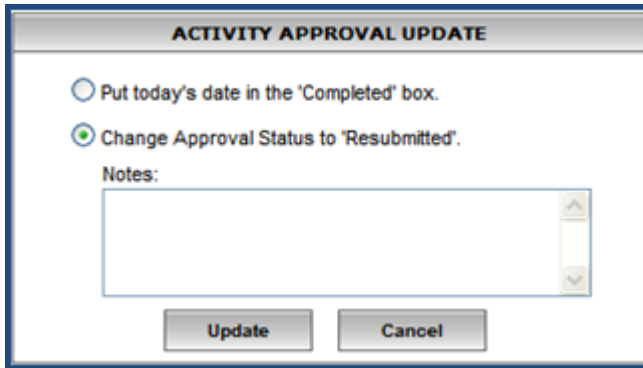
**Orders**

**Transaction Documents**

Name	Pgs	Approved	Archive	Tracking#	Upload Date	Log	Privilege
Doc2	3	<input type="checkbox"/>		6230-6433	1/8/2008 1:20:35 PM (PST)		
Doc3	13	<input type="checkbox"/>		6230-6433	1/8/2008 1:20:37 PM (PST)		
Multiple pages	2	<input type="checkbox"/>		6230-6433	1/8/2008 1:20:12 PM (PST)		
Signed Loan Documents Sent to Lender		<input type="checkbox"/>		6230-6433	11/12/2007 1:37:31 PM (PST)		

**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.



**ACTIVITY APPROVAL UPDATE**

Put today's date in the 'Completed' box.

Change Approval Status to 'Resubmitted'.

Notes:

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



# Transaction Summary Tab Details

Home   Mail	Calendar   FAQ   Help   Logout	
<span>Transactions</span>   <span>Orders</span>   <span>Properties</span>   <span>Contacts &amp; Providers</span>   <span>Documents</span>   <span>Reports</span>   <span>Profile &amp; Preferences</span>		
Property Address:	Transaction ID:	Escrow/Closing No.
Listing Price: \$	Represents/Status:	Escrow/Closing:
Sales Price: \$	Contract Acceptance Date:	Estimated Closing Date:
Year Built/Approximate Age:	Seller(s):	Buyer(s):
MLS No.	Seller's Agent:	Buyer's Agent:
	APN No.	File No.
<span>Transaction Summary</span>   <span>Transaction Contacts</span>   <span>Activities/Orders/Docs</span>   <span>Communication Log</span>		
<b>Transaction Details</b> <span style="float: right;">Save Save/Next</span>		
*Agent: <input type="text" value="FNRES Realty"/> - Select Agent - <input type="text"/>		
<input type="checkbox"/> Private Contact <input type="checkbox"/> Allow Full Access		
(Note: Agent represents SELLER for Dual Agency Transaction)		
*Agent Represents:	- Select -	Status: Pending
	(mm/dd/yyyy)	(mm/dd/yyyy)
*Sales Type:	- Select -	
Listing Date:	<input type="text"/>	Listing Expiration Date: <input type="text"/>
	(mm/dd/yyyy)	
Contract Acceptance Date:	<input type="text"/>	Days to Estimated Closing Date: <input type="text"/>
	(mm/dd/yyyy)	
Estimated Closing Date:	<input type="text"/>	Escrow Closing Date: <input type="text"/>
	(mm/dd/yyyy)	
Listing Price:	<input type="text"/>	Sale Price: <input type="text"/>
Loan Type:	Select Loan Type	Loan Amount: <input type="text"/>
		File Number: <input type="text"/>
		(mm/dd/yyyy)
Escrow/Closing No.:	<input type="text"/>	Title No.: <input type="text"/>
		Cancellation Date: <input type="text"/>
<b>Property Details</b>		
*Type:	- Select Property Type -	Yr. Built: <input type="text"/> Age: <input type="text"/>
*Address 1:	<input type="text"/>	MLS Board: Unknown Board
Address 2:	<input type="text"/>	MLS #: <input type="text"/>
*City:	<input type="text"/> *State: TX	
Zip:	<input type="text"/> - <input type="text"/> (Additional 4 digits optional)	APN: <input type="text"/>
	<input type="button" value="Property Search"/>	<input type="button" value="APN Search"/>
Area:	<input type="text"/> Sq. ft.	
<span style="border: 1px solid black; padding: 2px;">+ Additional Property Details</span>		
<span style="border: 1px solid black; padding: 2px;">+ Home Owners Association</span>		
Save Save/Next		



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

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

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.

← Previous
- Recently Modified -
Next →

Property Address: 2209 Miller Game Lane McKinney, TX 75070	Transaction ID: 6445-6648	Escrow/Closing No.
Listing Price: \$	Represents/Status: Buyer/Pending	Escrow/Closing:
Sale Price: \$289,599.00	Contract Acceptance Date: 02-10-2008	Estimated Closing Date: 03-26-2008
Year Built/Approximate Age: 2005/4	Seller(s):	Buyer(s): Grace Baker
MLS No. 1254621	Seller's Agent:	Buyer's Agent: Andrew Agent
	APN No.	File No.

Transaction Summary
Transaction Contacts
Activities/Orders/Docs
Communication Log

Transaction Details
Facing Sheet   Save   Save/Next

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**.

Transaction Details		Facing Sheet	Save	Save/Next
Agent:	Andrew Agent	<input type="checkbox"/> Allow Full Access	Created Date: 2/11/2008	
*Agent Represents:	Buyer	Status:	Pending	*Sales Type: Other
Listing Date:	(mm/dd/yyyy)	Listing Expiration Date:	(mm/dd/yyyy)	
Contract Acceptance Date:	2/10/2008	Days to Estimated Closing Date:	45	
Estimated Closing Date:	3/26/2008	Escrow Closing Date:	3/14/2008	
Listing Price:		Sale Price:	289,599.00	
Loan Type:	Select Loan Type	Loan Amount:		File Number: (mm/dd/yyyy)
Escrow/Closing No.:		Title No.:		Cancellation Date: (mm/dd/yyyy)

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.

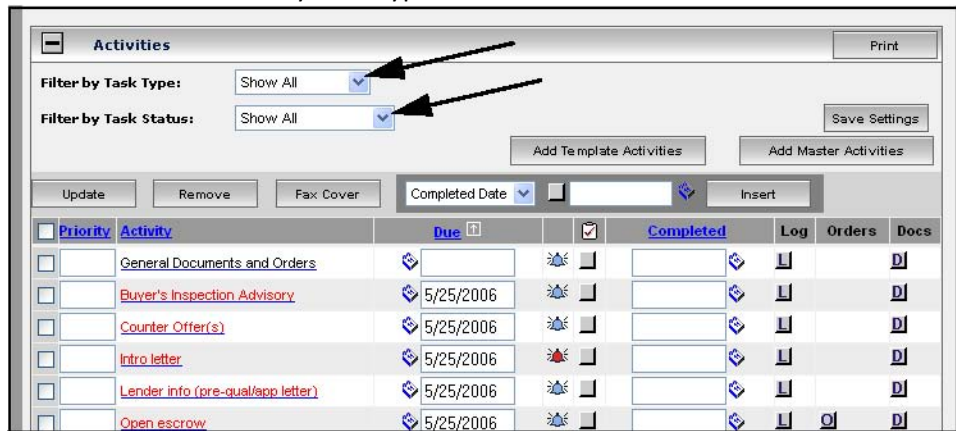
## Working with Transaction Activities

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:



The screenshot shows the 'Activities' interface. At the top, there are two dropdown menus: 'Filter by Task Type:' and 'Filter by Task Status:', both currently set to 'Show All'. Two black arrows point to these dropdown menus. Below the filters are buttons for 'Update', 'Remove', 'Fax Cover', 'Completed Date', and 'Insert'. There are also buttons for 'Add Template Activities' and 'Add Master Activities'. A 'Save Settings' button is located to the right of the filter dropdowns. The main area contains a table with columns: Priority, Activity, Due, Completed, Log, Orders, and Docs. The table lists several activities with their due dates set to 5/25/2006.

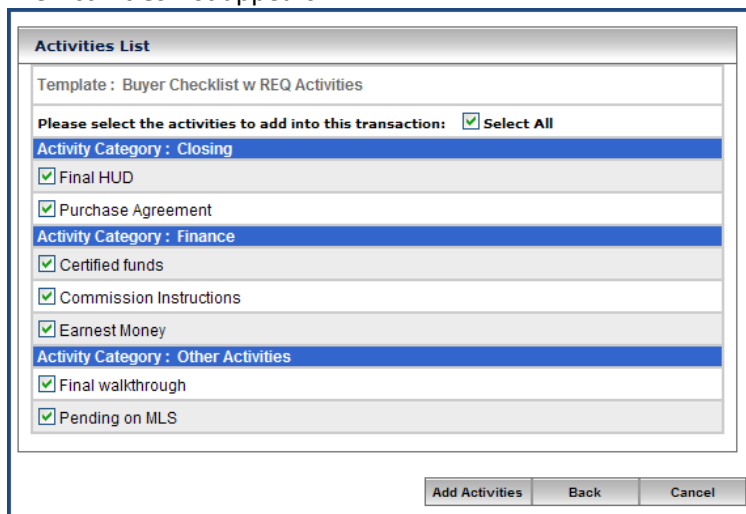
Priority	Activity	Due	Completed	Log	Orders	Docs
	General Documents and Orders					
	Buyer's Inspection Advisory	5/25/2006				
	Counter Offer(s)	5/25/2006				
	Intro letter	5/25/2006				
	Lender info (pre-qual/app letter)	5/25/2006				
	Open escrow	5/25/2006				

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.



The screenshot shows the 'Activities List' dialog box. It displays a template: 'Buyer Checklist w REQ Activities'. Below this, there is a checkbox labeled 'Please select the activities to add into this transaction:' which is checked and labeled 'Select All'. The activities are grouped into categories: 'Activity Category : Closing' (Final HUD, Purchase Agreement), 'Activity Category : Finance' (Certified funds, Commission Instructions, Earnest Money), and 'Activity Category : Other Activities' (Final walkthrough, Pending on MLS). At the bottom, there are three buttons: 'Add Activities', 'Back', and 'Cancel'.

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**.

Priority	Activity	Due	Completed	Log	Orders	Docs
<input type="checkbox"/>	Commission Instructions	05/14/2009	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Contract to Lender	05/14/2009	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Deliver Contract	05/14/2009	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Earnest Money	05/14/2009	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	Pending on MLS	05/14/2009	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

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

Click **Remove**.

### Remove Activities

Are you sure you want to remove the following activities?

Standard Activities
Contract to Lender
Deliver Contract

**Remove** **Cancel**

**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**:

Update	Remove	Fax Cover	Send to Outlook	Completed Date	Insert	
Priority	Activity	Due	Completed	Log	Orders	Docs
<input checked="" type="checkbox"/>	Commission Instructions	05/14/2009	<input type="checkbox"/>	<a href="#">L</a>	<a href="#">O</a>	<a href="#">D</a>
<input type="checkbox"/>	Contract to Lender	05/14/2009	<input type="checkbox"/>	<a href="#">L</a>	<a href="#">O</a>	<a href="#">D</a>
<input type="checkbox"/>	Deliver Contract	05/14/2009	<input type="checkbox"/>	<a href="#">L</a>	<a href="#">O</a>	<a href="#">D</a>

**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**

Update	Remove	Fax Cover	Send to Outlook	Completed Date	Insert	
Priority	Activity	Due	Completed	Log	Orders	Docs
<input type="checkbox"/>	Commission Instructions	05/14/2009	<input type="checkbox"/>	<a href="#">L</a>	<a href="#">O</a>	<a href="#">D</a>
<input type="checkbox"/>	Contract to Lender	05/14/2009	<input type="checkbox"/>	<a href="#">L</a>	<a href="#">O</a>	<a href="#">D</a>
<input type="checkbox"/>	Deliver Contract	05/14/2009	<input type="checkbox"/>	<a href="#">L</a>	<a href="#">O</a>	<a href="#">D</a>

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

All Contingencies Removed Date	17	<input type="checkbox"/>	After	Contract Acceptance Date	05/31/2009	<a href="#">C</a>
Possession Date		<input type="checkbox"/>	After	Contract Acceptance Date		<a href="#">C</a>
Estimated Closing Date	45	<input type="checkbox"/>	After	Contract Acceptance Date	06/28/2009	<a href="#">C</a>
Estimated Closing Date Per Contract	30	<input type="checkbox"/>	After	Contract Acceptance Date	06/13/2009	<a href="#">C</a>
<b>Update Activities</b>						

**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.

Update	Remove	Fax Cover	Send to Outlook	Due Date	Insert	
Priority	Activity	Due	Completed	Log	Orders	Docs
<input checked="" type="checkbox"/>	Commission Instructions	05/14/2009	<input type="checkbox"/>	<a href="#">L</a>	<a href="#">O</a>	<a href="#">D</a>
<input checked="" type="checkbox"/>	Contract to Lender	05/14/2009	<input type="checkbox"/>	<a href="#">L</a>	<a href="#">O</a>	<a href="#">D</a>
<input type="checkbox"/>	Deliver Contract	05/14/2009	<input type="checkbox"/>	<a href="#">L</a>	<a href="#">O</a>	<a href="#">D</a>

**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**:

Priority	Activity	Due	Completed	Log	Orders	Docs
<input checked="" type="checkbox"/>	Commission Instructions	05/14/2009	<input type="text" value="05/14/2009"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Contract to Lender	05/14/2009	<input type="text" value=""/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Deliver Contract	05/14/2009	<input type="text" value=""/>	<input type="checkbox"/>		<input type="checkbox"/>

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.

Priority	Activity	Due	Completed	Log	Orders	Docs
<input type="checkbox"/>	Commission Instructions	05/14/2009	<input type="text" value="05/14/2009"/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Contract to Lender	05/14/2009	<input type="text" value=""/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Deliver Contract	05/14/2009	<input type="text" value=""/>	<input type="checkbox"/>		<input type="checkbox"/>

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.

Priority	Activity	Due	Completed	Log	Orders	Docs
<input checked="" type="checkbox"/>	Commission Instructions	05/14/2009	<input type="text" value=""/>	<input type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Contract to Lender	05/14/2009	<input type="text" value=""/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Deliver Contract	05/14/2009	<input type="text" value=""/>	<input type="checkbox"/>		<input type="checkbox"/>

**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.

Priority	Activity	Due	Completed	Log	Orders	Docs
<input type="checkbox"/>	Commission Instructions	05/14/2009	<input type="text" value=""/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Contract to Lender	05/14/2009	<input type="text" value=""/>	<input type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Deliver Contract	05/14/2009	<input type="text" value=""/>	<input type="checkbox"/>		<input type="checkbox"/>



The **Activity Reminder** page appears.

**Activity Reminder**

Activity: Deposit earnest money  
Due Date: 5/15/2009  
 Reminder On Completion

**Reminder for Due Date**

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

**Contacts**

- Transaction Coordinator:** Claire Coordinator, FNRES Realty (Email: connie.shaw@fnres.com)
- Buyer's Agent:** Andrew Agent, FNRES Realty (Email: connie.shaw@fnres.com)
- Buyer:** Charles Buyer \*
- Seller:** Sally Seller \*
- CLOSING:** Tina Larson, Quick Closing (Email: connie.shaw@fnres.com)
- APPRAISAL:** Phil Acme, Acme Appraisal \*

\* No contact information available

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 will 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.

Update		Remove		Fax Cover		Send to Outlook		Due Date		Insert	
<input type="checkbox"/> Priority	Activity	Due		<input type="checkbox"/>	Completed	Log	Orders	Docs			
<input checked="" type="checkbox"/>	<a href="#">Commission Instructions</a>	05/14/2009		<input type="checkbox"/>				<a href="#">D</a>			
<input checked="" type="checkbox"/>	<a href="#">Contract to Lender</a>	05/14/2009		<input type="checkbox"/>				<a href="#">D</a>			
<input type="checkbox"/>	<a href="#">Deliver Contract</a>	05/14/2009		<input type="checkbox"/>				<a href="#">D</a>			

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

**Add Comments**

Activity: Earnest Money

Comments:

Comment Log			
Date	Time	Who	Comment
5/14/2009	5:58:07 PM (CDT)	Claire Coordinator	Awaiting receipt from Title

### 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**

Update		Remove		Fax Cover		Send to Outlook		Completed Date		Insert	
<input type="checkbox"/> Priority	Activity	Due		<input type="checkbox"/>	Completed	Log	Orders	Docs			
<input type="checkbox"/>	<a href="#">Commission Instructions</a>	05/14/2009		<input type="checkbox"/>				<a href="#">D</a>			
<input type="checkbox"/>	<a href="#">Contract to Lender</a>	05/14/2009		<input type="checkbox"/>				<a href="#">D</a>			
<input type="checkbox"/>	<a href="#">Deliver Contract</a>	05/14/2009		<input type="checkbox"/>				<a href="#">D</a>			
<input type="checkbox"/>	<a href="#">Earnest Money</a>	05/14/2009		<input type="checkbox"/>							
<input type="checkbox"/>	<a href="#">Pending on MLS</a>	05/14/2009		<input type="checkbox"/>				<a href="#">D</a>			
<input checked="" type="checkbox"/>	<a href="#">Deposit earnest money</a>	05/15/2009		<input type="checkbox"/>				<a href="#">D</a>			
<input type="checkbox"/>	<a href="#">Home Inspection</a>	05/15/2009		<input type="checkbox"/>			<a href="#">O</a>	<a href="#">D</a>			
<input type="checkbox"/>	<a href="#">Loan application</a>	05/15/2009		<input type="checkbox"/>							
<input checked="" type="checkbox"/>	<a href="#">Purchase Agreement</a>	05/15/2009		<input type="checkbox"/>				<a href="#">D</a>			

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	<input type="checkbox"/>	<input type="checkbox"/>
6996-7199	2219 56th Avenue NW, Frisco, TX 75035	Purchase Agreement	Purchase Agreement	<input type="checkbox"/>	<input type="checkbox"/>

**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) 886-2878

Please place this cover sheet on top of document.

Date: \_\_\_\_\_

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



2724



Process Id: 4175993



2724



Notes:

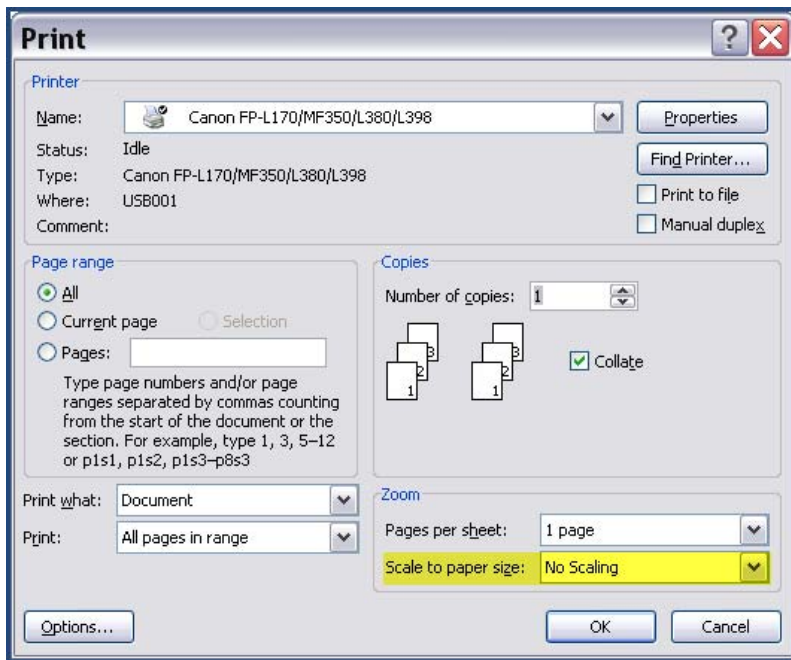
**File Name:** Copy of earnest money check  
**Transaction Number:** 7199  
**Site ID:** 126-P1  
**Property Address:** 2219 56th Avenue NW, Frisco, TX 75035  
**User ID:** 14439  
**Document Type:** Activity (26340): Deposit earnest money  
**Remove Cover Sheet?** No

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.

<input type="checkbox"/>	Priority	Activity	Due ↑	<input type="checkbox"/>	Completed	Log	Orders	Docs
<input type="checkbox"/>		<a href="#">Earnest Money</a>	05/14/2009	<input type="checkbox"/>				
<input type="checkbox"/>		<a href="#">Home Inspection</a>	05/15/2009	<input type="checkbox"/>				<b>D</b>
<input type="checkbox"/>		<a href="#">Purchase Agreement</a>	05/15/2009	<input type="checkbox"/>				<b>D</b>
<input type="checkbox"/>		<a href="#">Termite inspection</a>	05/15/2009	<input type="checkbox"/>				<b>D</b>
<input type="checkbox"/>		<a href="#">Well and/or Septic Tank inspection</a>	05/15/2009	<input type="checkbox"/>				<b>D</b>

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.

### Activity Document List Close

**Transaction #:** 6996-7199  
**Property:** 2219 56th Avenue NW , Frisco, TX 75035  
**Closing #:** 09-156198  
**Age:** 10

**Property Type:** Single Family  
**Sales Price:** \$145,000.00

**Buyer's Agent:** Andrew Agent  
**APN #:** 165-2165198

---

**Activity : Purchase Agreement**

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

**Inbox Documents**

Document Name	Date	
<input type="checkbox"/> notes_0609141754.doc	6/9/2008 2:17:54 PM (CDT)	📄 📧
<input type="checkbox"/> smoke_detector_state...	4/25/2008 9:43:22 AM (CDT)	📄 📧

Move/Copy
Remove

**Document Upload**

Document Name:

Select File:  Browse...

Document Security:  Document is Public  Document is Private  
(Note: Template Security Setting is Public)

Include in Customized Archive:  Yes  No

Upload

**Activity Documents**

Name ↑	Pgs	Approved	Archive	Tracking#	Upload Date	Log	Privilege
<input type="checkbox"/> <a href="#">Purchase Agreement</a>		☐		6996 - 7199	5/15/2009 9:00:03 AM (CDT)	📄	📄 📧

Mail
Move/Copy
Privilege
Rename
Archive
Remove
Print

Close

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.

MAIL DOCUMENTS	
List of Documents Selected	
1) Purchase Agreement	
Select Recipients	
<input type="checkbox"/>	Transaction Coordinator: Claire Coordinator, FNRES Realty (Email: connie.shaw@fnres.com) 
<input type="checkbox"/>	Buyer's Agent: Andrew Agent, FNRES Realty (Email: connie.shaw@fnres.com) 
<input type="checkbox"/>	Buyer: Charles Buyer *
<input type="checkbox"/>	Seller: Sally Seller *
<input type="checkbox"/>	CLOSING: Tina Larson, Quick Closing (Email: connie.shaw@fnres.com)
<input type="checkbox"/>	APPRAISAL: Phil Acme, Acme Appraisal *
* No Email specified or the user might have different notification or no notification method.	
Mail Options	
Enter Other Recipients:	<input type="text"/> (separated by ',')
Subject:	<input type="text"/>
Message:	<input type="text"/>
<input type="button" value="Send"/> <input type="button" value="Close"/>	

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.

<b>Property Details:</b>
Property Address : 2219 56th Avenue NW Frisco, TX 75035
Property Type : Single Family
Buyer Agent : Andrew Agent
<b>Message :</b>
Please find attached the fully executed agreement for your records.
<b>List of documents available to view:</b> Purchase Agreement
<b>Instructions:</b>
<ul style="list-style-type: none"><li>• Copy the document access code below. (Highlight the code and press Ctrl+C)</li><li>• Click on the link below and paste (Ctrl+V) the code in the Document Access page textbox.</li></ul> <i>NOTE: The document access code is always a combination of uppercase letters.</i>
Your document access code: <b>CPNRFELPWFNDLJE</b> <a href="#">Click here to view the documents using your access code noted above</a>
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. <a href="http://www.Demotpoint.com/DocAccess/DocAccess.aspx?sc=2663&amp;td=20090515091702">http://www.Demotpoint.com/DocAccess/DocAccess.aspx?sc=2663&amp;td=20090515091702</a>



### 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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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](mailto: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.

**MOVE OR COPY DOCUMENT**

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

List of Documents Selected	
Document Name	Rename To
1) Buyer's Agency Disclosure	<input type="text"/>

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

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.

Activity Documents								
Name ↑	Pgs	Approved	Archive	Tracking#	Upload Date	Log	Privilege	
<input type="checkbox"/> <a href="#">Purchase Agreement</a>		<input type="checkbox"/>		6996 - 7199	5/15/2009 9:00:03 AM (CDT)			
<input type="button" value="Mail"/> <input type="button" value="Move/Copy"/> <input type="button" value="Privilege"/> <input type="button" value="Rename"/> <input type="button" value="Archive"/> <input type="button" value="Remove"/> <input type="button" value="Print"/>								

The **Document Privilege** page appears.

**DOCUMENT PRIVILEGE**

---

**Document Rename**

Document Name: Purchase Agreement Uploaded On: 5/15/2009 9:00:03 AM (CDT)

Rename To:

---

**Document Security**

Document is Public  
 Document is Private

---

**Document Access**

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

Buyer: Charles Buyer  
 Seller: Sally Seller  
 CLOSING: Tina Larson, Quick Closing  
 APPRAISAL: Phil Acme, Acme Appraisal

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**

Activity Documents							
Name ↑	Pgs	Approved	Archive	Tracking#	Upload Date	Log	Privilege
<input checked="" type="checkbox"/> <a href="#">Purchase Agreement</a>		<input type="checkbox"/>		6996 - 7199	5/15/2009 9:00:03 AM (CDT)		
<input type="button" value="Mail"/> <input type="button" value="Move/Copy"/> <input style="background-color: yellow;" type="button" value="Privilege"/> <input type="button" value="Rename"/> <input type="button" value="Archive"/> <input type="button" value="Remove"/> <input type="button" value="Print"/>							

The **Document Privilege** page appears.

**DOCUMENT PRIVILEGE**

---

**Document Rename**

Document Name: Purchase Agreement Uploaded On: 5/15/2009 9:00:03 AM (CDT)

Rename To:

---

**Document Security**

Document is Public  
 Document is Private

---

**Document Access**

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

Buyer: Charles Buyer  
 Seller: Sally Seller  
 CLOSING: Tina Larson, Quick Closing  
 APPRAISAL: Phil Acme, Acme Appraisal

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**.

Activity Documents								
Name ↑	Pgs	Approved	Archive	Tracking#	Upload Date	Log	Privilege	
<input type="checkbox"/> <a href="#">Purchase Agreement</a>		<input type="checkbox"/>		6996 - 7199	5/15/2009 9:00:03 AM (CDT)			
<div style="display: flex; justify-content: space-between; padding: 0;"> <span>Mail</span> <span>Move/Copy</span> <span>Privilege</span> <span>Rename</span> <span style="background-color: yellow;">Archive</span> <span>Remove</span> <span>Print</span> </div>								

The **Documents – Customer Archive** page appears

**DOCUMENTS - CUSTOMIZED ARCHIVE**

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

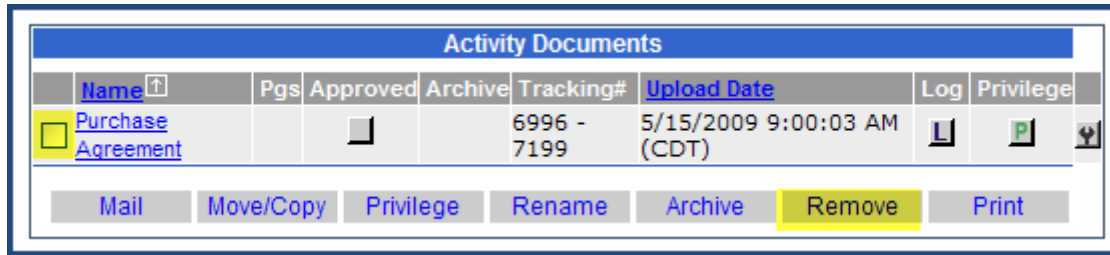
List of Documents Selected - Customized Archive		
Document Name	Current Setting	<input type="checkbox"/>
Purchase Agreement		<input type="checkbox"/>

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**.

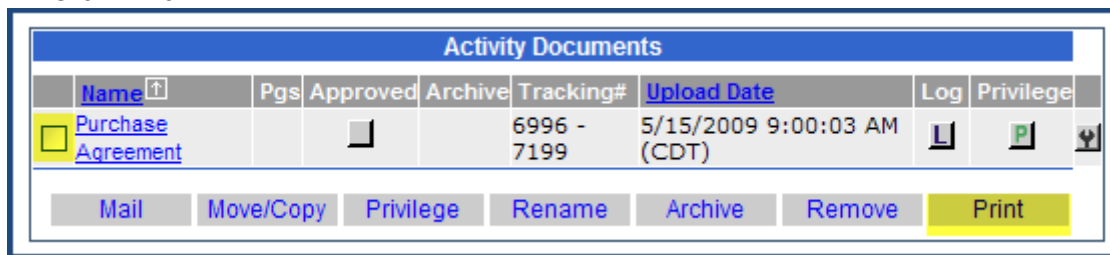


**Note:** The Site Admin may inactivate the Remove Document function. If you receive an error message restricting you from removing a document, please contact your Site Admin for assistance.

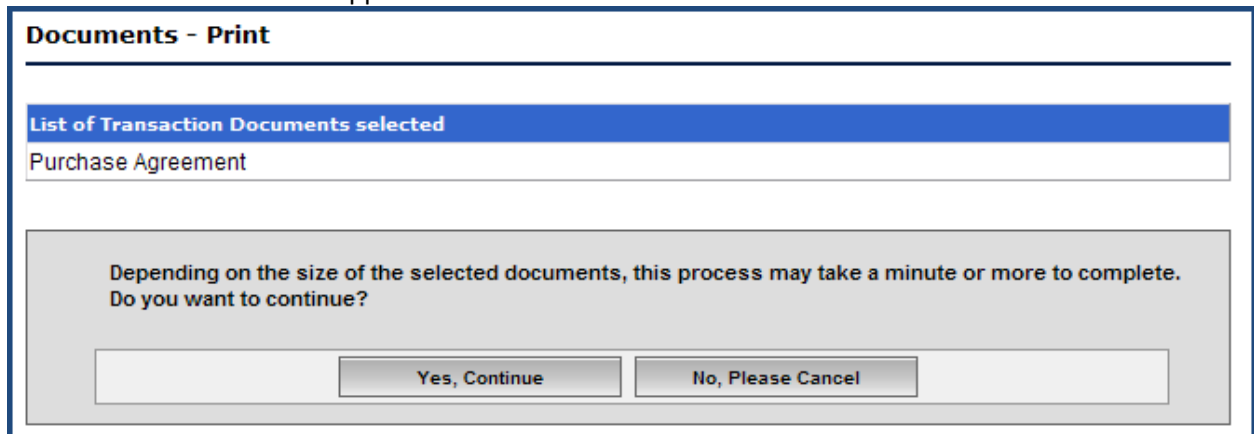
## Printing Documents

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.

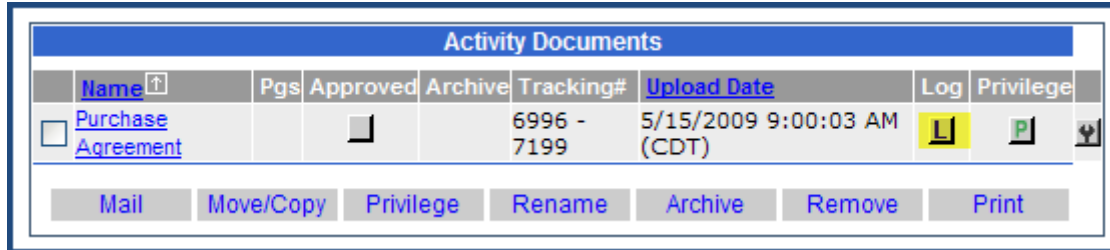
## Document Log

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.

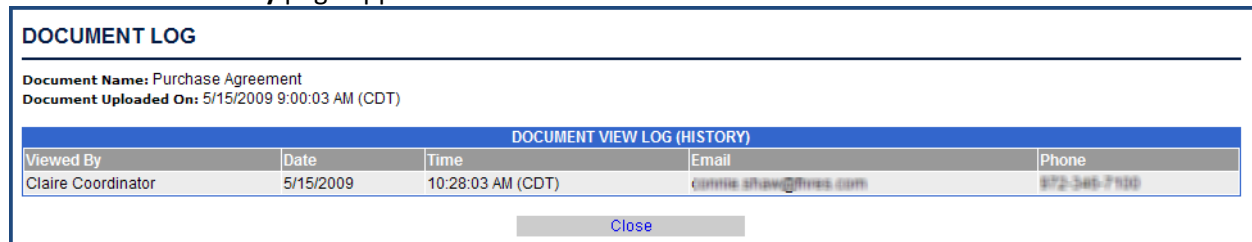
To access the Document Log:

1. Click the L icon associated with the document.



Activity Documents								
	Name ↑	Pgs	Approved	Archive	Tracking#	Upload Date	Log	Privilege
<input type="checkbox"/>	<a href="#">Purchase Agreement</a>		<input type="checkbox"/>		6996 - 7199	5/15/2009 9:00:03 AM (CDT)		
Mail Move/Copy Privilege Rename Archive Remove Print								

The **Document History** page appears



DOCUMENT LOG				
Document Name: Purchase Agreement				
Document Uploaded On: 5/15/2009 9:00:03 AM (CDT)				
DOCUMENT VIEW LOG (HISTORY)				
Viewed By	Date	Time	Email	Phone
Claire Coordinator	5/15/2009	10:28:03 AM (CDT)	connie.shaw@lps.com	872-345-7100

Close

**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:  Save Settings

Filter by Task Status:  Add Template Activities    Add Master Activities

Update    Remove    Fax Cover    Completed Date    Insert

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

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

### Activity Rules

---

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

**Activity Category:** Contingencies

**Agent Represents:** Seller

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

**Key Date:** Contract Acceptance Date

**Auto Schedulable?** Yes

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

**Upload Documents?** Yes

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

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

**A** → **Activity is Public or Private?** Public

**B** → **Include in Customized Archive?** No

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

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

**Activity Help**

HOA Package Sent to Buyer for Approval

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

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

### 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.

**Activities**

Filter by Task Type:

Filter by Task Status:

Activity	Due	Completed	Log	Orders	Docs
<input type="checkbox"/> General Documents and Orders					
<input checked="" type="checkbox"/> E-C4: Physical Inspection Report	7/1/24/2004			<b>O</b>	
<input type="checkbox"/> L-L4: Order Physical Inspection of VVener					
<input type="checkbox"/> E-C3: Termite Clearance					
<input type="checkbox"/> E-C3: Termite Report					
<input type="checkbox"/> E-C2: Order Termite Inspection				<b>O</b>	

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



The Select Provider page appears.

**Select Provider (Existing or Create)**

Add New Company      Select      Cancel

Contact Type: INSPECTOR      Pest Control Inspection

Providers: Show All

Filter By: -Select-      Search

Private Contact ?       Yes       No

Company	Branch	Contact(s)
Bugs R Us Plus	Bugs R Us Plus 4218 Miller Avenue McKinney, TX 75070	<input type="radio"/> Barney Frankford

Add New Branch      Add New Contact      Select

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

Add New Company      Select      Cancel

2. 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	Estimated
Property Address: 2219 56th Avenue NW	Acceptance Date: 05/14/2009	Closing Date: 06/28/2009
Frisco, TX 75035	Seller(s): Sally Seller	Buyer(s): Charles Buyer
MLS No. 126596	Seller's Agent:	Buyer's Agent: Andrew Agent
	APN: 165-2165198	Sales Type: Other

<b>Service Provider:</b> Barney Frankford	<b>Phone:</b> 972-346-3146	
<b>Company:</b> Bugs R Us Plus	<b>Fax Number:</b> 19492212395	
<b>Address:</b> 4218 Miller Avenue	<b>Email:</b> connie.shaw@fnres.com	
McKinney, TX 75070	<b>Company URL:</b> bugsrus.com	
	<b>Notification Preference:</b> 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	<input type="radio"/> Yes <input checked="" type="radio"/> No
Buyer's Agent	Andrew Agent FNRES Realty	972-346-3146	Email: connie.shaw@fnres.com	<input type="radio"/> Yes <input checked="" type="radio"/> No
Seller	Sally Seller		None	<input type="radio"/> Yes <input checked="" type="radio"/> No
Seller's Agent	Not Specified			<input type="radio"/> Yes <input checked="" type="radio"/> No
Closing	Tina Larson Quick Closing		Email: connie.shaw@fnres.com	<input type="radio"/> Yes <input checked="" type="radio"/> No
TC	Claire Coordinator FNRES Realty	972-346-7100	Email: connie.shaw@fnres.com	<input type="radio"/> Yes <input checked="" type="radio"/> 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 #:	4060-9547	Transaction # / Type:	6996-7199 / Other
Property Address:	2219 58th 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:	2219 58th Avenue NW, Frisco, TX 75035		
API #:	165-2155198	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		
Sellers:	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.

The screenshot shows a software interface with a header bar containing a search box with the text "Termite inspection", a date field "05/15/2009", and several icons. Below the header, the main content area is titled "INSPECTOR - Pest Control Inspection". To the right of this title are two buttons: "Place Order" and "Edit", with a green checkmark icon to the left of "Place Order". The contact information is organized into three columns:

<a href="#">Frankford, Barney</a> - Bugs R Us Plus 4218 Miller Avenue McKinney, TX 75070 USA Email: <a href="mailto:connie.shaw@fnres.com">connie.shaw@fnres.com</a> Comments:	<b>Home:</b> <b>Work:</b> 972-346-3146 <b>Fax:</b> 19492212395 <b>URL:</b> <a href="http://buqsrus.com">buqsrus.com</a>	<b>Cell:</b> 972-346-3146 <b>Pager:</b> <b>Voice Mail:</b> <b>Private Contact:</b> No
--	--	--

At the bottom right of the contact information area is a button labeled "Create vCard". Below the contact information, a green checkmark icon is followed by the text: "Order(s) already placed to the provider for this transaction."

## Maintaining Transactions

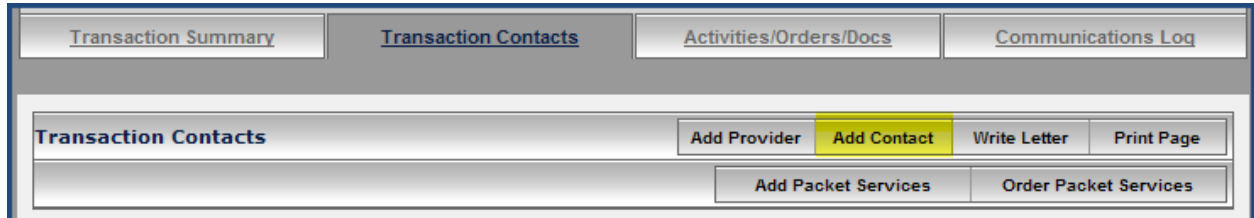
After you create a transaction, you can modify the information, if necessary. For example, you can:

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

## Adding Contacts

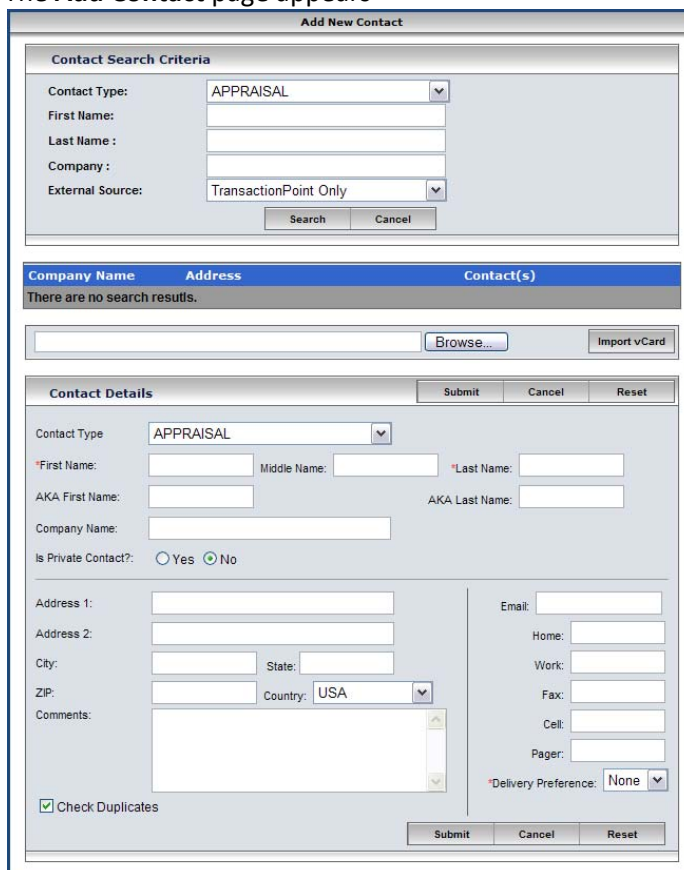
Adding contacts to a file allows the contact access to limited information within the transaction. Click on the Transaction ID to access the file.

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



The screenshot shows a web interface with four main tabs: "Transaction Summary", "Transaction Contacts", "Activities/Orders/Docs", and "Communications Log". Below these is a sub-section titled "Transaction Contacts" with four buttons: "Add Provider", "Add Contact" (highlighted in yellow), "Write Letter", and "Print Page". At the bottom of this section are two more buttons: "Add Packet Services" and "Order Packet Services".

The **Add Contact** page appears



The "Add New Contact" form is divided into several sections. The top section, "Contact Search Criteria", includes fields for "Contact Type" (set to APPRAISAL), "First Name", "Last Name", "Company", and "External Source" (set to TransactionPoint Only), with "Search" and "Cancel" buttons. Below is a table header with columns "Company Name", "Address", and "Contact(s)", containing the message "There are no search results." and "Browse..." and "Import vCard" buttons. The "Contact Details" section has "Submit", "Cancel", and "Reset" buttons. It contains fields for "Contact Type" (APPRAISAL), "First Name", "Middle Name", "Last Name", "AKA First Name", "AKA Last Name", "Company Name", "Is Private Contact?" (radio buttons for Yes/No), "Address 1", "Address 2", "City", "State", "ZIP", "Country" (USA), "Comments", "Email", "Home", "Work", "Fax", "Cell", "Pager", and "Delivery Preference" (None). A "Check Duplicates" checkbox is checked. "Submit", "Cancel", and "Reset" buttons are at the bottom.

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:

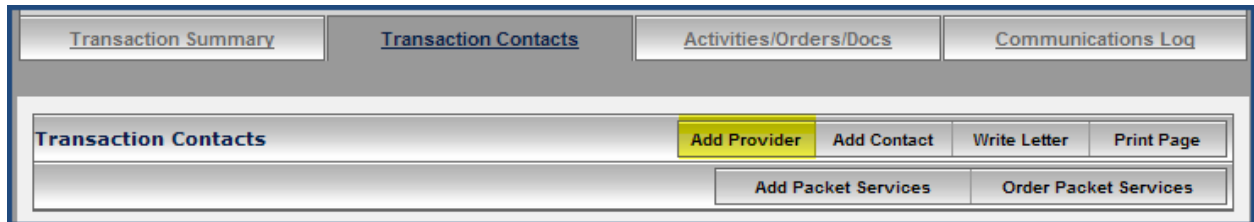
1. If the primary and co-agents are both Full Access Agents, then the co-agent will have full access.
2. If the primary agent's access is Full and the co-agent's access is View Only, then the co-agent will have view only access.
3. If the primary agent's access is View Only and the co-agent's access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

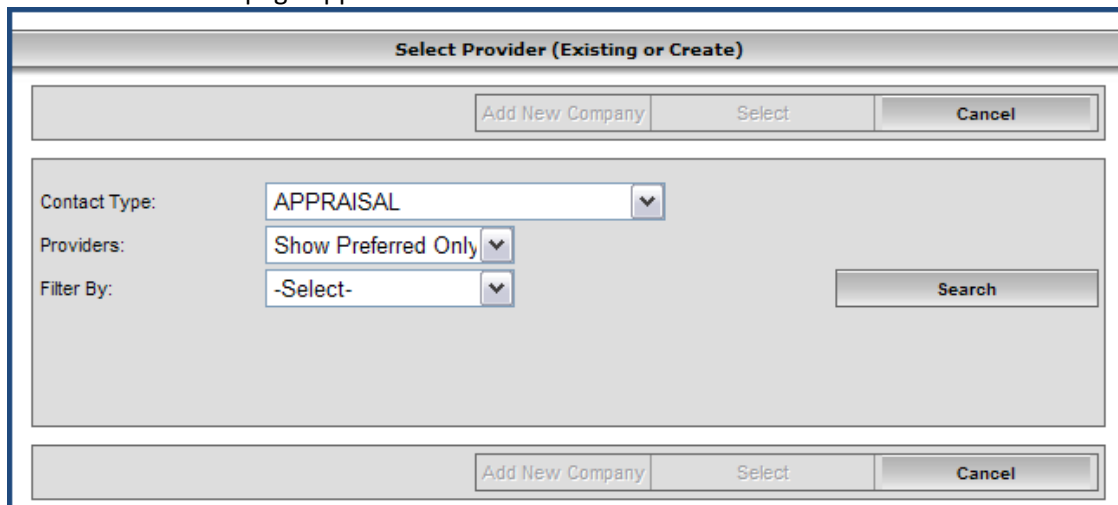
## Adding Providers

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.

A screenshot of a web application window titled 'Select Provider (Existing or Create)'. The window has a header bar with three buttons: 'Add New Company', 'Select', and 'Cancel'. Below the header, there are three dropdown menus: 'Contact Type:' with 'APPRAISAL' selected, 'Providers:' with 'Show Preferred Only' selected, and 'Filter By:' with '-Select-' selected. To the right of these dropdowns is a 'Search' button. At the bottom of the window, there are three buttons: 'Add New Company', 'Select', and 'Cancel'.

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**

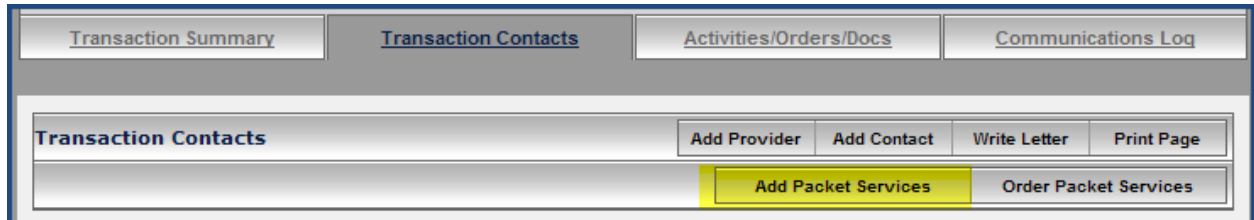
7. Select the appropriate Provider and click **Select**

**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

The screenshot shows the 'Packet Services' page. At the top, it says 'Packet Services' and 'Unchecking the select checkbox will remove the provider from the transaction'. Below this is a section titled 'My Packet Services' with a dropdown menu set to 'Residential Service Providers'. There are two service providers listed: 'Appraisal' (Dave Scott - San Gabriel Appraisers) and 'Escrow' (Clem Roberts - Eagle Rock Valley Closing). Both have 'Contact Info' checked and 'Private Contact?' set to 'No'. Below this is a section titled 'Real Estate Agent Packet Services' with a dropdown menu set to 'KAnderson - Residential'. There are two service providers listed: 'Appraisal' (Dave Scott - San Gabriel Appraisers) and 'Home Warranty' (Josh McMannis - Home Warranty Services). Both have 'Contact Info' checked and 'Private Contact?' set to 'No'. At the bottom of each section are 'Select' and 'Cancel' buttons.

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.

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

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	Estimated
Property Address: 2219 56th Avenue NW	Acceptance Date: 05/14/2009	Closing Date: 06/28/2009
Frisco, TX 75035	Seller(s): Sally Seller	Buyer(s): Charles Buyer
MLS No. 126596	Seller's Agent:	Buyer's Agent: Andrew Agent
	APN: 165-2165198	Sales Type: Other

<b>Service Provider:</b> Barney Frankford	<b>Phone:</b> 972-346-3146	
<b>Company:</b> Bugs R Us Plus	<b>Fax Number:</b> 19492212395	
<b>Address:</b> 4218 Miller Avenue	<b>Email:</b> connie.shaw@fnres.com	
McKinney, TX 75070	<b>Company URL:</b> bugsrus.com	
	<b>Notification Preference:</b> 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	<input type="radio"/> Yes <input checked="" type="radio"/> No
Buyer's Agent	Andrew Agent FNRES Realty	972-346-3146	Email: connie.shaw@fnres.com	<input type="radio"/> Yes <input checked="" type="radio"/> No
Seller	Sally Seller		None	<input type="radio"/> Yes <input checked="" type="radio"/> No
Seller's Agent	Not Specified			<input type="radio"/> Yes <input checked="" type="radio"/> No
Closing	Tina Larson Quick Closing		Email: connie.shaw@fnres.com	<input type="radio"/> Yes <input checked="" type="radio"/> No
TC	Claire Coordinator FNRES Realty	972-346-7100	Email: connie.shaw@fnres.com	<input type="radio"/> Yes <input checked="" type="radio"/> 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:**

**Attached Documents**

**Special Instructions:**

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.
- If you want to make documents available to the provider, click **Upload Documents**, enter the **Document Name**, select the file, and click **Submit**.
  - Enter any **Special Instructions**.
  - 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:	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
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
Country:	USA		
Work Phone:	972-346-7100	Cell Phone:	
Fax:		Pager:	
Email:	connie.shaw@fnres.com		
Clients			
Buyer			
Name:	Charles Buyer		
Address:			
City:		State:	
Country:	USA		
Home Phone:		Cell Phone:	
Email:			
Seller			
Name:	Sally Seller		
Address:			
City:		State:	
Country:	USA		
Home Phone:		Cell Phone:	
Email:			
Closing Information			
Closing Company:	Quick Closing		
Closing Officer:	Tina Larson		
Closing #:	09-156198	Closing 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			

- 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.

Transaction Details		Facing Sheet		Save	Save/Next
Agent:	Andrew Agent	<input checked="" type="checkbox"/> Allow Full Access	Created Date:	5/14/2009	
*Agent Represents:	Buyer	Status:	Pending	*Sales Type:	Other
Listing Date:	5/1/2009	Listing Expiration Date:	7/1/2009		
Contract Acceptance Date:	5/14/2009	Days to Estimated Closing Date:	45		
Estimated Closing Date:	6/28/2009	Escrow Closing Date:	6/29/2009		
Listing Price:	149,599.00	Sale Price:	145,000.00		
Loan Type:	Conventional/Institutional	Loan Amount:	140,000.00	File Number:	09-2456
Escrow/Closing No.:	09-156198	Title No.:		Cancellation Date:	

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

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.

Facing Sheet		Close	Save	Print Letter Size	Print Legal Size
<b>2219 56th Avenue NW</b> <b>Frisco, TX 75035</b>		<b>Transaction #:</b> 6996-7199		<b>APN#:</b> 165-2165198	
<b>Property Type:</b>	Single Family	<b>MLS:</b> 126596		<b>Mgr. Approval</b>	
<b>List Price:</b>	\$149,599.00	<b>Sales Price:</b>		\$145,000.00	
<b>Contract Acceptance Date</b>	05/14/2009	<b>Listing Date</b>		05/01/2009	
<b>Estimated Closing Date</b>	06/28/2009	<b>Listing Expiration Date</b>		07/01/2009	
<b>Property Condition Contingency</b>	05/24/2009	<b>Title Contingency</b>		05/24/2009	
<b>Increase of Deposit</b>	05/21/2009	<b>All Contingencies Removed Date</b>		05/31/2009	
<b>Financing Contingency Removal</b>	05/24/2009	<b>Estimated Closing Date Per Contract</b>		06/13/2009	

## 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.

**Step 1** →

**Step 2** →

Transaction Center  
Transaction Queue List  
**Archive Center**  
Transaction Data Sheet

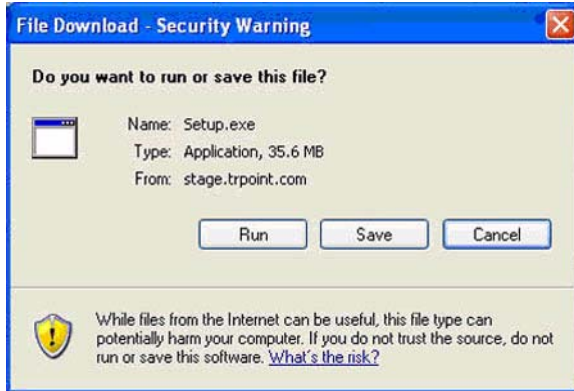
Please Note:  
In order to use the archiving and auto-burn feature, you must first download and install the TransactionPoint Archive Utility client application. You need to do this only once.

You can download the [TP Archive Utility \(New Version\)](#).

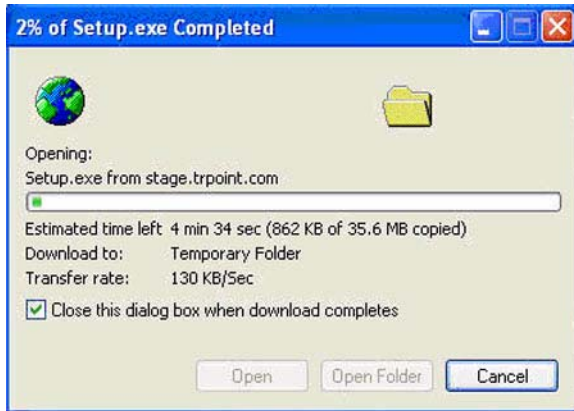
TP Archive Utility supports only Windows 2000 and Windows XP. If you need more information please [click](#) here or call customer support.

**Branch:** Demo Realty  
**Agent:** Show All  
**Agent Represents:** Show All  
**Status:** Pending  
**With:** Show All  
**Other Filters:** Property Address  
Search

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



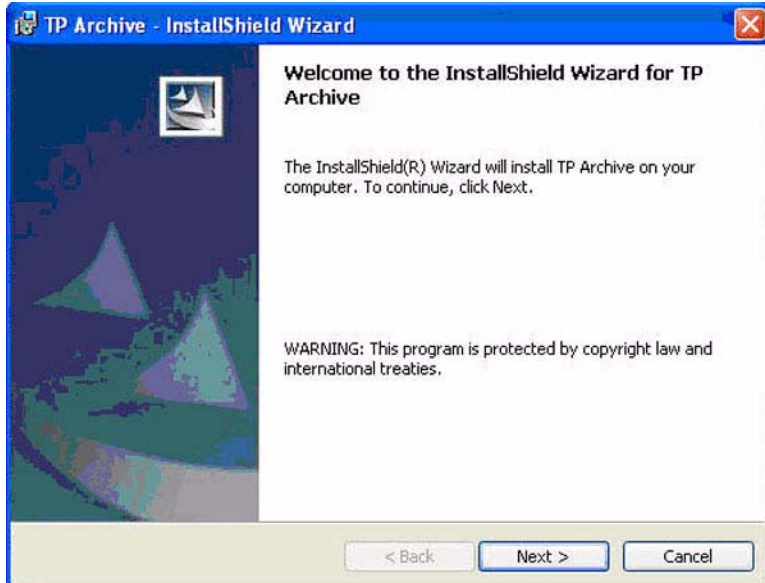
The screen below is shown to indicate that the software is installing on your computer:



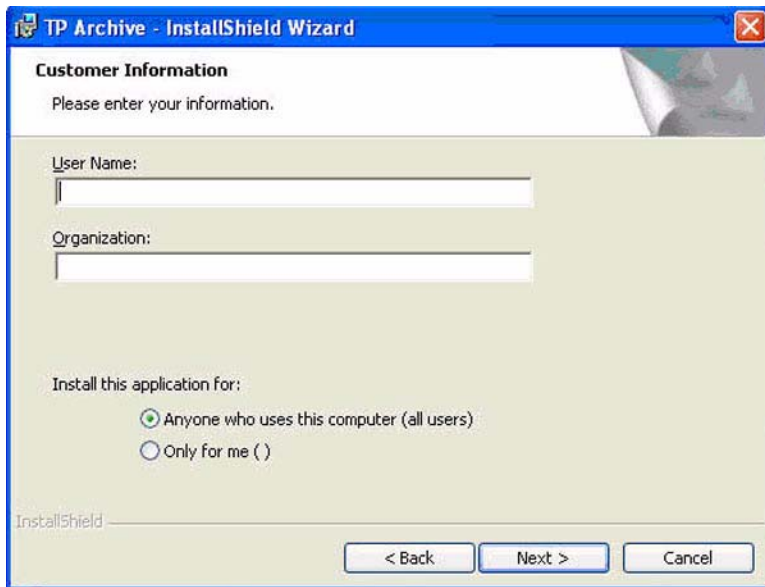
4. Click **Run** in the Security Warning window (shown below) that pops up.



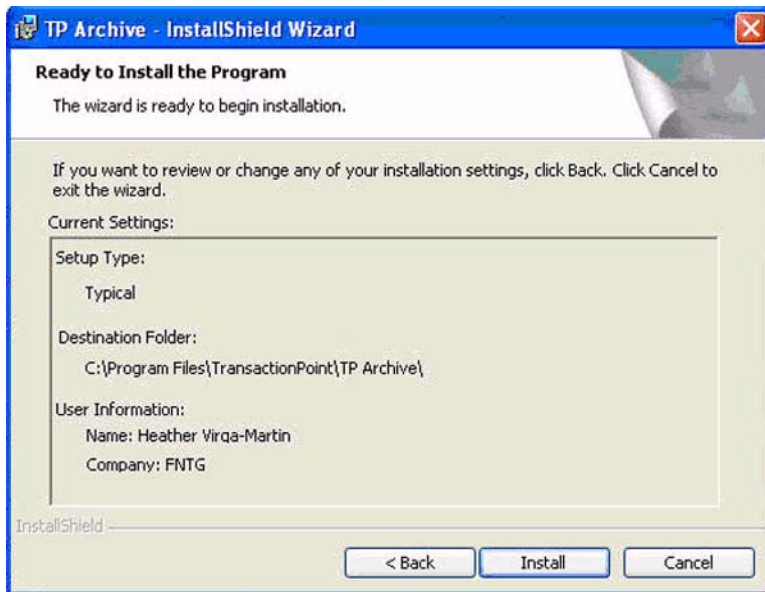
5. Click **Next** in the TP Archive-InstallShield Wizard window (shown below) that pops up.



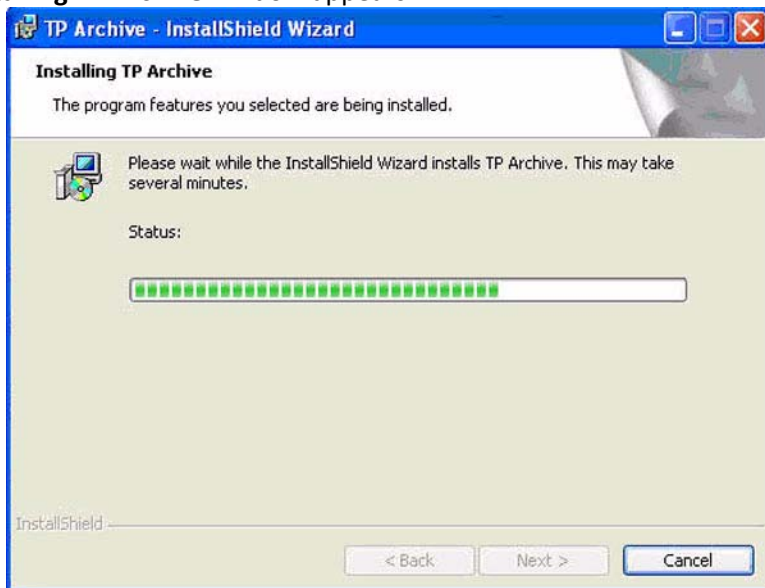
6. Type your name and company name, select **Anyone who uses this computer (all users)**, and click **Next**.



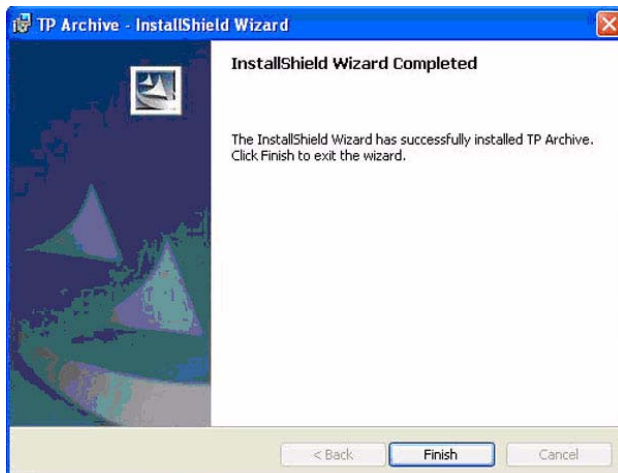
7. Click **Install**.



The **Installing TP Archive** window appears.



8. When the **InstallShield Wizard Completed** window appears, click **Finish**. You are now ready to archive transactions.

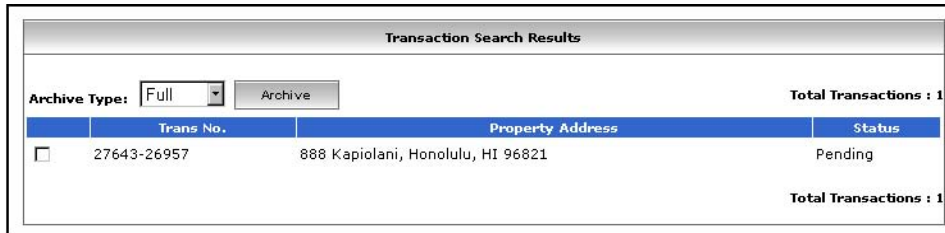




## Archiving Transactions

**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.

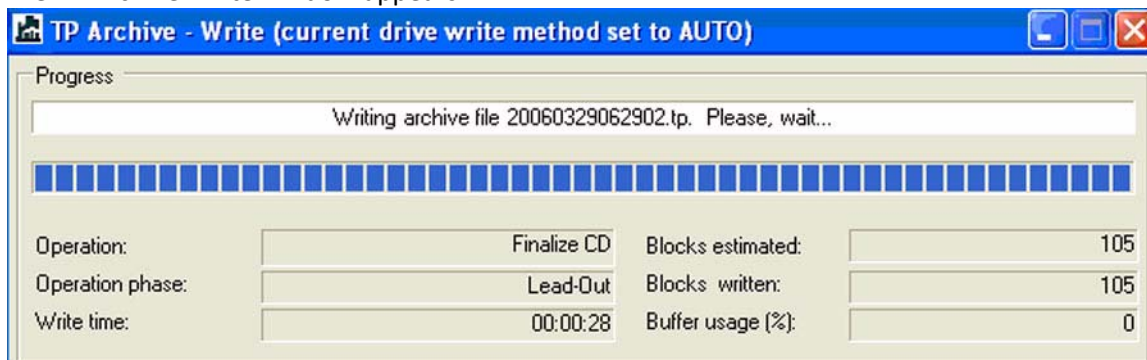
**Custom** - Allows you to archive a customized list of documents and activities. Customized archive is available when you upload documents directly to TransactionPoint or fax documents into TransactionPoint using the fax cover sheet. This feature can also be made available using defaults set in the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





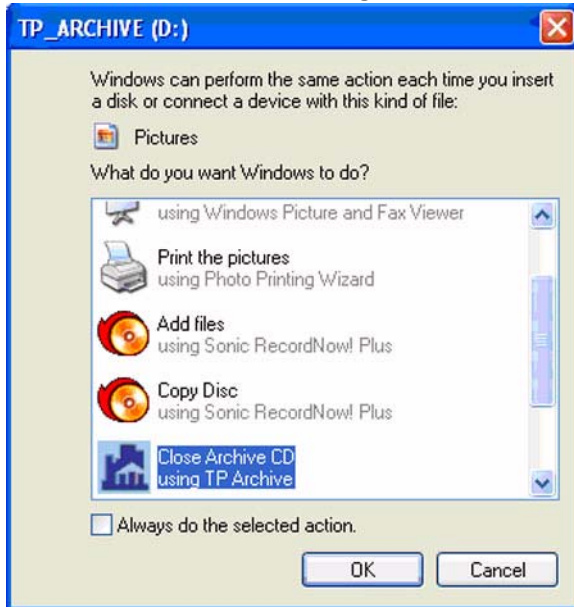
**Note:** If this window appears, click **Cancel**.



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**.



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.

Trans #	Property Address	Activity	File Name	Remove Cover Sheet	Include in Customized Archive
7042-7245	2119 Thompson Road, Frisco, TX 75035	Commission Instructions	Commission Instructions	<input type="checkbox"/>	<input type="checkbox"/>
7042-7245	2119 Thompson Road, Frisco, TX 75035	Contract to Lender	Purchase & Sale Agreement	<input type="checkbox"/>	<input type="checkbox"/>
7042-7245	2119 Thompson Road, Frisco, TX 75035	Home Inspection	Home Inspection Report	<input type="checkbox"/>	<input type="checkbox"/>

### 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 screenshot shows the 'Transaction Documents' window. At the top, there is a toolbar with buttons for Mail, Move/Copy, Privilege, Rename, Archive, Remove, Print, and Upload. The 'Upload' button is circled in red. Below the toolbar is a table with columns: Name, Pgs, Approved, Archive, Tracking#, Upload Date, Log, and Privilege. A single document is listed: 'Survey.pdf' with 1 page, not approved, and an upload date of 5/26/2009 12:09:27 PM (CDT).

The Upload Document window appears:

### Upload Document

You can upload a document (eg; PDF, Microsoft Word, text, TIF) for a Transaction and later move it to a Transaction Activity or an Order.

**Document Name:**

**Select File:**

**Document Security:**  Document is Public  Document is Private

**Include in Customized Archive:**  Yes  No

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

## Order Center

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

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

The **Order Center** page appears.

The screenshot shows the Order Center interface with the following elements:

- Navigation tabs: Transactions, Orders, Properties, Contacts & Providers, Documents, Reports, Profile & Preferences.
- Sub-tabs: Existing Order Search, Batch Order Search.
- Instructions: To see ALL orders, click on the pull-down next to "Status" and select "Show All".
- Search filters:
  - Branch: FNRES Realty
  - Agent: (\* InActive Agents) All Agents
  - Status: - Show All -
  - Search by: Address
- Search button: Search
- Order Search Results section:
  - Page navigation: 1 2 3
  - Total Orders: 29
  - Table with columns: Order ID, Type, Provider, Order Date, Status, Status Last Changed.
  - Agent: Agent, Andrew
  - Transaction 5801-6006 for 319 Haverhill Circle Turnberry Building 1, Warner Robins, GA 31088 (Transaction Order Summary)
  - 3805-6292 Home Inspection Barney Frankford 11/13/2007 3:50:21 PM (CST) Order Completed 8/5/2008 12:15:12 PM (CDT)
  - Transaction 6420-6623 for 452002 Camp Bowie Avenue, Frisco, TX 75035 (Transaction Order Summary)

## 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**

The screenshot shows a dropdown menu for "Order Placed Between..." with the following options:

- Show All -
- Active Orders (Order Placed/Accepted/Rescheduled)
- Order Accepted
- Order Cancelled
- Order Completed
- Order Placed
- Order Rescheduled

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	
<p><b>Order Details</b> <span style="float: right;"><a href="#">Back to Order Center</a></span></p> <p> <b>Order #:</b> 3805-6292      <b>Transaction #/Type:</b> 5801-6006 / Unspecified  <b>Property Address:</b> 319 Haverhill Circle, Warner Robins, GA 31088      <b>Service Type:</b> Home Inspection  <b>Order Status:</b> Order Completed      <b>Order Date:</b> 11/13/2007 3:50:22 PM (CST)         </p>			
<b>Property Information</b>			
<b>Property Address</b> <b>Property Address:</b> 319 Haverhill Circle, Warner Robins, GA 31088 <b>APN #:</b> <b>Map Book/Code:</b> <b>Cross Street:</b> <b>Brief Directions:</b>			
<b>Property Details</b>			
<b>Property Type:</b> Single Family <b>Property Area:</b> 1194 sq. ft. <b>Property Includes:</b> <b>Power is:</b> ON <b>Approx. Age:</b> 5 <b>Property is:</b> Owner Occupied			
<b>Service Ordered</b>			
<b>Service:</b> Home Inspection <b>Service Provider:</b> Barney Frankford <b>Company Name:</b> Bugs R Us Plus <b>Address:</b> 4218 Miller Avenue <b>City:</b> McKinney <b>State:</b> TX <b>Zip:</b> 75070 <b>Phone:</b> 972-346-3146 <b>Fax:</b> 19492212395 <b>Cell Phone:</b> 972-346-3146 <b>Pager:</b> <b>Email:</b> connie.shaw@fnres.com <b>Payment:</b> Payment at Inspection only <b>Client:</b> Becki Cassidy <b>Ordered For:</b> Buyer <b>Order Date:</b> 11/13/2007 3:50:22 PM (CST) <b>Agent:</b> Andrew Agent <b>Order Placed By:</b> Claire Coordinator <b>Status:</b> Order Completed			
<b>Details of Service Ordered</b>			
<b>Appointment Date</b> <b>Date:</b> Wednesday 8/6/2008 9:00:00 AM (CDT) <b>Duration:</b> 08:00 Hrs			
<b>Agent Information</b>			
<b>Buyer's Agent</b>			
<b>Name:</b> Andrew Agent <b>Company:</b> FNRES Realty <b>Address:</b> 9005 Amber Downs Drive McKinney TX 75070 USA <b>Work Phone:</b> 972-346-3146 <b>Cell Phone:</b> <b>Fax:</b> 9492212395 <b>Pager:</b> <b>Email:</b> connie.shaw@fnres.com			
<b>Seller's Agent</b>			
Seller's Agent Details Not Entered			
<b>Transaction Coordinator Information</b>			
<b>Name:</b> Claire Coordinator <b>Company:</b> FNRES Realty <b>Address:</b> 9005 Amber Downs Drive <b>City:</b> McKinney <b>State:</b> TX <b>Zip:</b> 75070 <b>Country:</b> USA <b>Work Phone:</b> 972-346-7100 <b>Cell Phone:</b> <b>Fax:</b> <b>Pager:</b> <b>Email:</b> connie.shaw@fnres.com			
<b>Clients</b>			
<b>Buyer</b>			
<b>Name:</b> Becki Cassidy <b>Address:</b> <b>City:</b> <b>State:</b> <b>Zip:</b> <b>Country:</b> USA <b>Home Phone:</b> <b>Cell Phone:</b> <b>Email:</b> connie.shaw@fnres.com			
<b>Seller</b>			
Seller's Details Not Entered			
<b>Closing Information</b>			
<b>Closing Company:</b> <b>Closing Officer:</b> <b>Closing #:</b> <b>Close Date:</b> <b>Address:</b> <b>Work Phone:</b> <b>Cell Phone:</b> <b>Fax:</b> <b>Pager:</b> <b>Email:</b>			
<b>Status History and Comments</b>			
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	
<b>Notification of Status Changes and Order Documents</b>			
	Send?	Send By	
<b>Buyer:</b>	No		
<b>Seller:</b>	No		
<b>Buyer's Agent:</b>	No		
<b>Seller's Agent:</b>	No		
<b>Closing:</b>	No		
<b>TC:</b>	No		
<a href="#">Back</a>			



### 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

<a href="#">Order Details</a>	<a href="#">Change Status</a>	<a href="#">Comments</a>	<a href="#">Documents</a>	<a href="#">Edit Order</a>
<b>Order Details</b>				<a href="#">Back to Order Center</a>
<b>Order #:</b>	3838-6325	<b>Transaction #/Type:</b>	<a href="#">6420-6623</a> / Other	
<b>Property Address:</b>	452002 Camp Bowie Avenue, Frisco, TX 75035	<b>Service Type:</b>	Home Inspection	
<b>Order Status:</b>	Order Placed	<b>Order Date:</b>	1/29/2008 11:55:11 AM (CST)	

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

Property Information	
<b>Property Address</b>	
<b>Property Address:</b>	452002 Camp Bowie Avenue , Frisco, TX 75035
<b>APN #:</b>	75-25-1546
<b>Map Book/Code:</b>	<b>Cross Street:</b>
<b>Brief Directions:</b>	
<b>Property Details</b>	
<b>Property Type:</b>	Single Family
<b>Property Area:</b>	2800 sq. ft.
<b>Property Includes:</b>	
<b>Stories:</b>	1
<b>Power is:</b>	OFF
<b>Approx. Age:</b>	N/A
<b>Property is:</b>	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			
<b>Buyer's Agent</b>			
<b>Name:</b>	Andrew Agent		
<b>Company:</b>	FNRES Realty		
<b>Address:</b>	9005 Amber Downs Drive McKinney TX 75070 USA		
<b>Work Phone:</b>	972-346-3146	<b>Cell Phone:</b>	
<b>Fax:</b>	9492212395	<b>Pager:</b>	
<b>Email:</b>	connie.shaw@fnres.com		
<b>Seller's Agent</b>			
Seller's Agent Details Not Entered			
Transaction Coordinator Information			
<b>Name:</b>	Claire Coordinator		
<b>Company:</b>	FNRES Realty		
<b>Address:</b>	9005 Amber Downs Drive		
<b>City:</b>	McKinney	<b>State:</b>	TX <b>Zip:</b> 75070
<b>Country:</b>	USA		
<b>Work Phone:</b>	972-346-7100	<b>Cell Phone:</b>	
<b>Fax:</b>		<b>Pager:</b>	
<b>Email:</b>	connie.shaw@fnres.com		
Clients			
<b>Buyer</b>			
Buyer's Details Not Entered			
<b>Seller</b>			
Seller's Details Not Entered			
Status History and Comments			
<b>Date</b>	<b>Status</b>	<b>Entered By</b>	<b>Comments</b>
5/26/2009 11:24:14 AM (CDT)	Order Placed	Claire Coordinator	

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:	
Referral 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	
<a href="#">Back</a>		
<a href="#">Back to Order Center</a>		

### Changing Order Status

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

Order Details	Change Status	Comments	Documents
<b>Order Details</b>			<a href="#">Back to Order Center</a>
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

Order Details	Change Status	Comments	Documents
<b>Order Status History</b>			<a href="#">Back to Order Center</a>
<b>Order #:</b> <a href="#">3853-6340</a> <b>Property Address:</b> 452002 Camp Bowie Avenue , Frisco, TX 75035 <b>Order Status:</b> Order Placed	<b>Service Type:</b> Appraisal <b>Order Date:</b> 3/4/2008 1:32:27 PM (CST)		
After selecting a new status, add comments in the "Add Comments" field. Click the "Change Status" button.			
<b>Change Status</b>			
<b>Current Status:</b> Order Placed <b>New Status:</b> <input type="text" value="-Select New Status-"/> <input type="button" value="v"/> <b>Comments:</b> <input type="text"/> <input type="button" value="v"/> <input type="button" value="^"/>	<input type="button" value="Change Status"/>		
<b>Status History and Comments</b>			
Date	Status	Entered By	Comments
3/4/2008 1:32:27 PM (CST)	Order Placed	Claire Coordinator	
<input type="button" value="Back to Order Center"/>			

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

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

### Adding Order Comments

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

Order Details	Change Status	Comments	Documents
<b>Order Details</b>			<a href="#">Back to Order Center</a>
<b>Order #:</b> <a href="#">3853-6340</a> <b>Property Address:</b> 452002 Camp Bowie Avenue, Frisco, TX 75035 <b>Order Status:</b> Order Placed	<b>Transaction #/Type:</b> <a href="#">6420-8623</a> / Other <b>Service Type:</b> Appraisal <b>Order Date:</b> 3/4/2008 1:32:27 PM (CST)		

The **Order Status History** page appears.

## Order Status History

[Back to Order Center](#)

---

**Order #:** [3853-6340](#)

**Property Address:** 452002 Camp Bowie Avenue, Frisco, TX 75035

**Order Status:** Order Placed

**Service Type:** Appraisal

**Order Date:** 3/4/2008 1:32:27 PM (CST)

---

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

**Add Comments**

**Current Status:** Order Placed

**Comments:**

Log Comment

---

**Status History and Comments**

Date	Status	Entered By	Comments
3/4/2008 1:32:27 PM (CST)	Order Placed	Claire Coordinator	

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

Order Details
Change Status
Comments
Documents

---

## Order Details

[Back to Order Center](#)

---

**Order #:** [3853-6340](#)

**Property Address:** 452002 Camp Bowie Avenue, Frisco, TX 75035

**Order Status:** Order Placed

**Transaction #/Type:** [6420-6623](#) / Other

**Service Type:** Appraisal

**Order Date:** 3/4/2008 1:32:27 PM (CST)

The **Order Documents** page appears.

## Order Documents

Back to Order Center

---

**Order #:** [3853-6340](#)

**Property Address:** 452002 Camp Bowie Avenue, Frisco, TX 75035

**Order Status:** Order Placed

**Service Type:** Appraisal

**Order Date:** 3/4/2008 1:32:27 PM (CST)

---

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

Inbox Documents

Document Name	Date	
<input type="checkbox"/> notes_0609141754.doc	6/9/2008 2:17:54 PM (CDT)	📄 📧
<input type="checkbox"/> smoke_detector_state...	4/25/2008 9:43:22 AM (CDT)	📄 📧

Move/Copy
Remove

Upload Documents

**Document Name:**

**Select File:**  Browse...

**Document Security:**  Document is Public  Document is Private

**Include in Customized Archive:**  Yes  No

**Comments:**

Upload

Existing Order Documents

Name	Pgs	Approved	Tracking#	Upload Date	Log	Privilege

Back to Order Center

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

**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.

Order Details
Change Status
Comments
Documents
Edit Order

---

## Order Details

Back to Order Center

**Order #:** [3838-6325](#)

**Property Address:** 452002 Camp Bowie Avenue, Frisco, TX 75035

**Order Status:** Order Placed

**Transaction #/Type:** [6420-6623](#) / Other

**Service Type:** Home Inspection

**Order Date:** 1/29/2008 11:55:11 AM (CST)



The Edit Order Detail page appears.

Order Details	Change Status	Comments	Documents	Edit Order								
<b>Edit Order Details</b> <span style="float: right;"><a href="#">Back to Order Center</a></span>												
<b>Order #:</b> 3838-4125 <b>Property Address:</b> 452002 Camp Bowie Avenue, Frisco, TX 75035 <b>Order Status:</b> Order Placed		<b>Transaction #/Type:</b> 6420-8631 / Other <b>Service Type:</b> Home Inspection <b>Order Date:</b> 1/29/2008 11:55:11 AM (CST)										
<b>Property Information</b>												
<b>Property Address</b> Address: 452002 Camp Bowie Avenue Address (cont'd): City: Frisco State: TX Zip: 75035 Nearest Cross Street: Map Book: Brief Directions:												
<b>Property Details</b>												
Property Type: Single Family Area: 2000 Sq. ft. Property Includes (choose all that apply): <input type="checkbox"/> 1 Stories <input type="checkbox"/> Basement <input type="checkbox"/> Crawlspace <input type="checkbox"/> Accessible ABC <input type="checkbox"/> Excessive Deferred Maintenance <input type="checkbox"/> Power is ON Detached Buildings: <input type="checkbox"/> 2 Car Garage <input type="checkbox"/> 3+ Car Garage <input type="checkbox"/> Utility Shed <input type="checkbox"/> Farm Building <input type="checkbox"/> Guest or 2nd Home Approx. sq. ft.: Approximate Age of property: Property is: <input checked="" type="radio"/> Owner Occupied <input type="radio"/> Vacant <input type="radio"/> Tenant Occupied Tenant Name: Home Phones: Work Phones:												
<b>Service Ordered</b>												
Service: Home Inspection Service Provider: Barney Frankford Company Name: Bugs R Us Plus Address: 4218 Miller Avenue City: McKinney State: TX Zip: 75070 Phone: 972-346-3145 Fax: 9492212395 Call Phone: 972-346-3145 Email: connie.shaw@fres.com Payments: Payment at Inspection only Client: Joanne Middleton Ordered For: Buyer Order Date: 1/29/2008 11:55:11 AM (CST) Agent: Andrew Agent Order Placed By: Claire Coordinator Status: Order Placed												
<b>Details of Service Ordered</b>												
<b>Recommended Appointment Dates</b>												
First Choice: 1 30 2000 AM Second Choice: 1 31 2000 AM Third Choice: 2 1 2000 AM												
<b>Agent Information</b>												
<b>Buyer's Agent</b> Name: Andrew Agent Company: FRES Realty Address: 9005 Amber Downs Drive McKinney TX 75070 USA Work Phone: 972-346-3145 Fax: 9492212395 Email: connie.shaw@fres.com												
<b>Seller's Agent</b> First Name: Last Name: Company: Address: City: State: Zip: Work Phone: Call Phone: Fax: Pager: Email:												
<b>Transaction Coordinator Information</b> Name: Claire Coordinator Company: FRES Realty Address: 9005 Amber Downs Drive City: McKinney State: TX Zip: 75070 Country: USA Work Phone: 972-346-7100 Call Phone: Fax: Pager: Email: connie.shaw@fres.com												
<b>Clients</b>												
<b>Buyer</b> First Name: Joanne Last Name: Middleton Address: 2001 Miller Lane Address (cont'd): City: McKinney State: TX Zip: 75070 Work Phone: Call Phone: Email: Joanne@email.en												
<b>Seller</b> Seller's Details Not Entered												
<b>Closing Information</b>												
Closing Company: Quick Closing Closing Officer: Tina Larson Closing #: Close Date: 2 28 Address: 18 MLK Way City: McKinney State: TX Zip: 75071 Work Phone: Fax: Call Phone: Call Domain: Pager: Pager Pin: Email: connie.shaw@fres.com Receive notification by: <input type="radio"/> None <input checked="" type="radio"/> Email <input type="radio"/> Fax												
<b>Status History and Comments</b>												
<table border="1"> <thead> <tr> <th>Date</th> <th>Status</th> <th>Entered By</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>1/29/2008 11:55:12 AM (CST)</td> <td>Order Placed</td> <td>Claire Coordinator</td> <td></td> </tr> </tbody> </table>					Date	Status	Entered By	Comments	1/29/2008 11:55:12 AM (CST)	Order Placed	Claire Coordinator	
Date	Status	Entered By	Comments									
1/29/2008 11:55:12 AM (CST)	Order Placed	Claire Coordinator										
<b>Notification of Status Changes and Order Documents</b>												
Buyer: <input type="radio"/> Yes <input type="radio"/> No Seller: <input checked="" type="radio"/> Yes <input type="radio"/> No Buyer's Agent: <input type="radio"/> Yes <input type="radio"/> No Seller's Agent: <input checked="" type="radio"/> Yes <input type="radio"/> No Closing: <input type="radio"/> Yes <input type="radio"/> No SD: <input checked="" type="radio"/> Yes <input type="radio"/> No												
Submit <a href="#">Back to Order Center</a>												

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.

The screenshot shows the 'Order Center' interface with the following elements:

- Navigation Tabs:** Transactions, Orders (selected), Properties, Contacts & Providers, Documents, Reports, Profile & Preferences.
- Search Options:** Existing Order Search (selected), Batch Order Search.
- Instructions:** To see ALL orders, click on the pull-down next to "Status" and select "Show All"
- Filters:**
  - Branch: FNRES Realty
  - Agent: (\* InActive Agents) All Agents
  - Status: - Show All -
  - Search by: Address
- Search Button:** Search
- Order Search Results:**
  - Page: 1 2 3
  - Total Orders: 29
  - Agent: Agent, Andrew
- Table of Results:**

Order ID	Type	Provider	Order Date	Status	Status Last Changed
Transaction 5801-6006 for 319 Haverhill Circle Turnberry Building 1, Warner Robins, GA 31088					
<a href="#">3805-6292</a>	Home Inspection	Barney Frankford	11/13/2007 3:50:21 PM (CST)	Order Completed	8/5/2008 12:15:12 PM (CDT)
Transaction 6420-6623 for 452002 Camp Bowie Avenue, Frisco, TX 75035					

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				
<a href="#">3838-6325</a>	1/29/2008			
Lead/Paint Inspection				
Miscellaneous Inspection				
Mold Inspection				
Pest Control Inspection				
<a href="#">3841-6328</a>	1/29/2008			
Plumbing Inspection				
Pool/spa Inspection				
Radon Inspection				
Roof Inspection				
Security/Alarm Inspection				
Septic/Sewer Inspection				
<a href="#">3857-6344</a>	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				
<a href="#">3853-6340</a>	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.

The screenshot shows the Order Center interface with the following elements:

- Navigation tabs: Transactions, Orders, Properties, Contacts & Providers, Documents, Reports, Profile & Preferences.
- Search options: Existing Order Search, Batch Order Search.
- Instructions: "To see ALL orders, click on the pull-down next to 'Status' and select 'Show All'"
- Filters:
  - Branch: FNRES Realty
  - Agent: (\* InActive Agents) All Agents
  - Status: - Show All -
  - Search by: Address
- Search button: Search
- Order Search Results section with pagination (1 2 3) and Total Orders: 29.
- Table of search results with columns: Order ID, Type, Provider, Order Date, Status, Status Last Changed.

- 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**.

Order ID	Type	Provider	Order Date	Status	Status Last Changed	
Transaction 6420-6623 for 452002 Camp Bowie Avenue, Frisco, TX 75035 <a href="#">Transaction Order Summary</a>						
<a href="#">3853-6340</a>	Appraisal	Ellen Appiasal	3/4/2008 1:32:27 PM (CST)	Order Placed	3/4/2008 1:32:27 PM (CST)	<a href="#">Remove</a>
<a href="#">3841-6328</a>	Pest Control Inspection	Barney Frankford	1/29/2008 4:08:43 PM (CST)	Order Placed	1/29/2008 4:08:43 PM (CST)	<a href="#">Remove</a>
<a href="#">3838-6325</a>	Home Inspection	Barney Frankford	1/29/2008 11:55:11 AM (CST)	Order Placed	1/29/2008 11:55:11 AM (CST)	<a href="#">Remove</a>
<a href="#">3857-6344</a>	Septic/Sewer Inspection	Barney Frankford	3/14/2008 10:39:02 AM (CDT)	Order Rescheduled	3/14/2008 10:40:20 AM (CDT)	

- A warning page appears.

**Warning!**

The Order and all its associated information will be permanently removed from the system.

Do you want to Proceed?

[Yes](#) [No](#)

- 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 or Remove the Property Information.

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

The screenshot shows the Property Center interface with the following elements:

- Navigation tabs: Transactions, Orders, Properties, Contacts & Providers, Documents, Reports, Profile & Preferences.
- Sub-tabs: Property Center, Property Upload.
- Search filters:
  - Branch: FNRES Realty
  - Agent: (\* InActive Agents) All Agents
  - Search by: Address
  - Property Status: All (selected), Active, Closed
  - Search button
- Property Search Results:
  - Total Properties: 21
  - Page navigation: 1 2 3
  - Table with columns: Property #, Property Address, Trans #, and buttons for New Transaction and Remove.

Property #	Property Address	Trans #	
<b>Agent: Agent, Andrew</b>			
<a href="#">P14440-6801</a>	123 Main Street, Concord, NC 28027		<a href="#">New Transaction</a> <a href="#">Remove</a>
<a href="#">P14440-7042</a>	2119 Thompson Road, Frisco, TX 75035	7042-7245	*** <a href="#">New Transaction</a> <a href="#">Remove</a>
<a href="#">P14440-6433</a>	22 Michelson Drive, Frisco, TX 75035	6433-6636	*** <a href="#">New Transaction</a> <a href="#">Remove</a>

### 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**.

Property #	Property Address	Trans #		
<b>Agent:</b> Agent, Andrew				
<a href="#">P14440-6801</a>	123 Main Street, Concord, NC 28027			<a href="#">New Transaction</a> <a href="#">Remove</a>
<a href="#">P14440-7042</a>	2119 Thompson Road, Frisco, TX 75035	7042-7245	***	<a href="#">New Transaction</a> <a href="#">Remove</a>
<a href="#">P14440-6433</a>	22 Michelson Drive, Frisco, TX 75035	6433-6636	***	<a href="#">New Transaction</a> <a href="#">Remove</a>

The **Property Details Page** appears

### PROPERTY DETAILS

Agent: Andrew Agent

---

**Property Address** \* required

**Address: \***

**City: \***  **State: \***  **Zip: \***

**Nearest Cross Street:**

**Map Book:**  **Map Code:**

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

**Property Type: \***

**APN #:**

**MLS Board:**  **MLS Number:**

---

**Property Specifications**

**Property Type:** Single Family **Area:**  Sq. ft.

<b>Property Includes (choose all that apply):</b> <b>Stories:</b> <input type="text" value="1"/> * <input type="checkbox"/> Basement <input type="checkbox"/> Crawlspace <input type="checkbox"/> Accessible Attic <input type="checkbox"/> Excessive Deferred Maintenance <input checked="" type="checkbox"/> Power is ON <b>Property Year Built:</b> <input type="text" value="2004"/> <b>Comments on showing property:</b> <i>(e.g. Day sleeper, pets in yard, uncooperative tenant, etc.)</i>	<b>Detached Buildings</b> <table border="0" style="width: 100%;"> <tr> <td></td> <td style="text-align: right;">Approx. sq. ft.</td> </tr> <tr> <td><input type="checkbox"/> 2 Car Garage</td> <td><input type="text"/></td> </tr> <tr> <td><input type="checkbox"/> 3+ Car Garage</td> <td><input type="text"/></td> </tr> <tr> <td><input checked="" type="checkbox"/> Utility Shed</td> <td><input type="text"/></td> </tr> <tr> <td><input type="checkbox"/> Farm Building</td> <td><input type="text"/></td> </tr> <tr> <td><input type="checkbox"/> Guest or 2nd Home</td> <td><input type="text"/></td> </tr> </table> <b>Approximate Age of property:</b> <input type="text" value="5"/> <input type="text" value="Great Large Corner Lot in Dover Meadows! 12x12 outbuilding and above"/>		Approx. sq. ft.	<input type="checkbox"/> 2 Car Garage	<input type="text"/>	<input type="checkbox"/> 3+ Car Garage	<input type="text"/>	<input checked="" type="checkbox"/> Utility Shed	<input type="text"/>	<input type="checkbox"/> Farm Building	<input type="text"/>	<input type="checkbox"/> Guest or 2nd Home	<input type="text"/>
	Approx. sq. ft.												
<input type="checkbox"/> 2 Car Garage	<input type="text"/>												
<input type="checkbox"/> 3+ Car Garage	<input type="text"/>												
<input checked="" type="checkbox"/> Utility Shed	<input type="text"/>												
<input type="checkbox"/> Farm Building	<input type="text"/>												
<input type="checkbox"/> Guest or 2nd Home	<input type="text"/>												

**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**.

Property #	Property Address	Trans #		
<b>Agent:</b> Agent, Andrew				
<a href="#">P14440-6801</a>	123 Main Street, Concord, NC 28027			<a href="#">New Transaction</a> <a href="#">Remove</a>
<a href="#">P14440-7042</a>	2119 Thompson Road, Frisco, TX 75035	7042-7245	***	<a href="#">New Transaction</a> <a href="#">Remove</a>
<a href="#">P14440-6433</a>	22 Michelson Drive, Frisco, TX 75035	6433-6636	***	<a href="#">New Transaction</a> <a href="#">Remove</a>

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**

Property #	Property Address	Trans #		
<b>Agent:</b> Agent, Andrew				
<a href="#">P14440-6801</a>	123 Main Street, Concord, NC 28027			<a href="#">New Transaction</a> <a href="#">Remove</a>
<a href="#">P14440-7042</a>	2119 Thompson Road, Frisco, TX 75035	7042-7245	***	<a href="#">New Transaction</a> <a href="#">Remove</a>
<a href="#">P14440-6433</a>	22 Michelson Drive, Frisco, TX 75035	6433-6636	***	<a href="#">New Transaction</a> <a href="#">Remove</a>

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

### Delete Property

---

Do you really want to delete this Property?

[Yes](#) [No](#)

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

### Delete Property

---

Property has been deleted successfully!

[Close](#)

## 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.

**CLIENT CENTER**  
**Branch:** FNRES Realty  
**Agent:** Select Agent  
**Search by:** Last Name  **Search**  
Select an agent above in order to view the list of clients.

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 CENTER**  
**Branch:** FNRES Realty  
**Agent:** Andrew Agent  
**Search by:** Last Name  **Search**

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

## Updating Client Information

1. Click the client name.

### CLIENT CENTER

Branch:

Agent:

Search by:

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

Address:  City:  State:

Zip:  Country:

Home Phone:  Work:  Fax:

E-mail:  Mobile/Cell:

Notes:

(Maximum of 255 characters)

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

**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.

### CLIENT CENTER

**Branch:** FNRES Realty

**Agent:** Andrew Agent

**Search by:** Last Name

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

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.

Password has been sent to Mr. Joe Seller, at email address [joe\\_seller@transactionpoint.com](mailto:joe_seller@transactionpoint.com)

**User Information**

**Client Name:** Mr. Joe Seller  
**User ID:** joe\_seller  
**Password:** trp01nt

**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:**  ▼

**Agent:**  ▼

**Search by:**  ▼

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



The **Loan Information** page appears

<b>Loan Information</b>	Personal Information	Employment Information	Income/Expenses	Assets/Liabilities	Transaction Declaration
* required					
<b>Type of Mortgage and Terms of Loan</b>					
<b>Mortgage Type:</b>	Others(Explain) ▼	<input type="text"/>	*		
<b>Loan Amount (\$):</b>	<input type="text"/>	*	<b>Interest Rate:</b>	<input type="text"/>	%
<b>Amortization Type:</b>	Others(Explain) ▼	<input type="text"/>	*	<b>No. of Months:</b>	<input type="text"/>
<b>Property Information and Purpose of Loan</b>					
<b>Property Address:</b>	2209 Miller Game Lane				
<b>City:</b>	McKinney	<b>State:</b>	TX	<b>Zipcode:</b>	75070
<b>Legal Description of Subject Property :</b>					
<input type="text"/>					
<b>Number of Units:</b>	<input type="text"/>	*	<b>Age:</b>	4 Years	
<b>Property will be:</b>	Primary Residence ▼				
<b>Purpose of Loan:</b>	Others(Explain) ▼	<input type="text"/>	*		
<b>Complete this section if this is a CONSTRUCTION or CONSTRUCTION-PERMANENT loan.</b>					
<b>Year lot Acquired :</b>	<input type="text"/>	<b>Original Cost (\$):</b>	<input type="text"/>	<b>Existing Liens (\$):</b>	<input type="text"/>
				<b>Present value of lot :</b>	<input type="text"/>
				<b>Cost of improvement (\$):</b>	<input type="text"/>
<b>Complete this section if this is a REFINANCE loan.</b>					
<b>Year Acquired :</b>	<input type="text"/>	<b>Original Cost (\$):</b>	<input type="text"/>	<b>Existing Liens (\$):</b>	<input type="text"/>
<b>Purpose of Refinance :</b>	<input type="text"/>				
<b>Describe Improvements :</b>	<input type="text"/>				
<input type="radio"/> made	<input type="radio"/> to be made	<b>Costs (\$):</b>	<input type="text"/>		
<b>Title</b>					
<b>Title will be held in the name :</b>	<input type="text"/>				
<b>Manner in which title will be held :</b>	<input type="text"/>				
<b>Estate will be held in :</b>	<input type="text"/>				
<input type="radio"/> Fee Simple	<input type="radio"/> Leasehold	<b>Source of Downpayment :</b>	<input type="text"/>		
<a href="#">Next ▶</a>					

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**.

### CLIENT CENTER

**Branch:** FNRES Realty

**Agent:** Andrew Agent

**Search by:** Last Name

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

The **Write Letter** page appears.

### Write Letter

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

Select a Letter Template

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

\* Non-editable default template

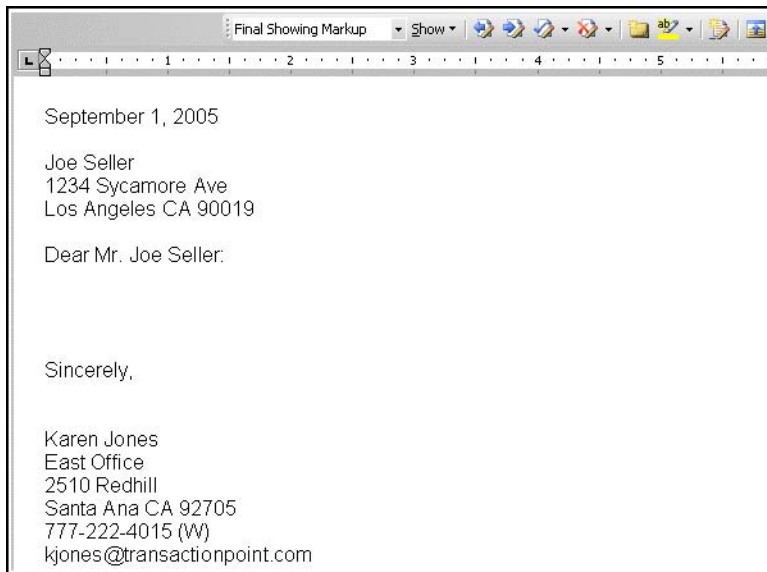
Select Recipients

- [Becki Cassidy](#)  
PROPERTY:  
319 Haverhill Circle Turnberry Building 1, Warner Robins, GA 31088
- [Ben Buyer](#)  
PROPERTY:  
123 Main Street, Concord, NC 28027
- [Ben Buyer](#)  
PROPERTY:  
22 Michelson Drive, Frisco, TX 75035
- [Charles Buyer](#)  
PROPERTY:  
2219 56th Avenue NW, Frisco, TX 75035
- [Dee Dee](#)  
PROPERTY:  
2400 W Dunkeld, Denver, CO 80211
- [George Williams](#)  
PROPERTY:  
22 Parkland Avenue, McKinney, TX 75070
- [Grace Baker](#)  
PROPERTY:  
2209 Miller Game Lane, McKinney, TX 75070

**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**.

CLIENT CENTER				
Branch:	FNRES Realty			
Agent:	Andrew Agent			
Search by:	Last Name	<input type="text"/>	Search	
Client	Type	Property Address		
<a href="#">Becki Cassidy</a>	Buyer	<a href="#">319 Haverhill Circle, Turberrv Building 1 Warner Robins, GA 31088</a>	<a href="#">User Info</a>	<a href="#">Loan Info</a>
<a href="#">Ben Buyer</a>	Buyer	<a href="#">123 Main Street, Concord, NC 28027</a>	<a href="#">User Info</a>	<a href="#">Loan Info</a>
<a href="#">Ben Buyer</a>	Buyer	<a href="#">22 Michelson Drive, Frisco, TX 75035</a>	<a href="#">User Info</a>	<a href="#">Loan Info</a>
<a href="#">Charles Buyer</a>	Buyer	<a href="#">2219 56th Avenue NW, Frisco, TX 75035</a>	<a href="#">User Info</a>	<a href="#">Loan Info</a>
<a href="#">Dee Dee</a>	Seller	<a href="#">2400 W Dunkeld, Denver, CO 80211</a>	<a href="#">User Info</a>	
<a href="#">George Williams</a>	Buyer	<a href="#">22 Parkland Avenue, McKinney, TX 75070</a>	<a href="#">User Info</a>	<a href="#">Loan Info</a>
<a href="#">Grace Baker</a>	Buyer	<a href="#">2209 Miller Game Lane, McKinney, TX 75070</a>	<a href="#">User Info</a>	<a href="#">Loan Info</a>
<a href="#">Dan Baker ( Spouse)</a>				
<a href="#">Grace Baker</a>	Buyer	<a href="#">221 NE Tacoma, Tacoma, WA 98422</a>	<a href="#">User Info</a>	<a href="#">Loan Info</a>
<a href="#">Joanne Middleton</a>	Buyer	<a href="#">452002 Camp Bowie Avenue, Frisco, TX 75035</a>	<a href="#">User Info</a>	<a href="#">Loan Info</a>
<a href="#">Joe Morales</a>	Buyer	<a href="#">45646 Miller Avenue, McKinney, TX 75070</a>	<a href="#">User Info</a>	<a href="#">Loan Info</a>
<a href="#">Sally Seller</a>	Seller	<a href="#">2219 56th Avenue NW, Frisco, TX 75035</a>	<a href="#">User Info</a>	
<a href="#">Write Letter</a>				

The **Write Letter** page appears.

### Write Letter

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

---

**Select a Letter Template**

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

\* Non-editable default template

---

**Select Recipients**

- [Becki Cassidy](#)  
**PROPERTY:**  
319 Haverhill Circle Turnberry Building 1, Warner  
Robins, GA 31088
- [Ben Buyer](#)  
**PROPERTY:**  
123 Main Street, Concord, NC 28027
- [Ben Buyer](#)  
**PROPERTY:**  
22 Michelson Drive, Frisco, TX 75035
- [Charles Buyer](#)  
**PROPERTY:**  
2219 56th Avenue NW, Frisco, TX 75035
- [Dee Dee](#)  
**PROPERTY:**  
2400 W Dunkeld, Denver, CO 80211
- [George Williams](#)  
**PROPERTY:**  
22 Parkland Avenue, McKinney, TX 75070
- [Grace Baker](#)  
**PROPERTY:**  
2209 Miller Game Lane, McKinney, TX 75070

1. Click **New**.

---Insert Merge Fields---    ---Insert Contact Merge Fields---    ---Insert My Merge Fields---    ---Insert Escrow Merge Fields---

----START FROM EXISTING TEMPLATES----

Hint: Press Enter to start a new paragraph. Press Shift-Enter to change to a new line.

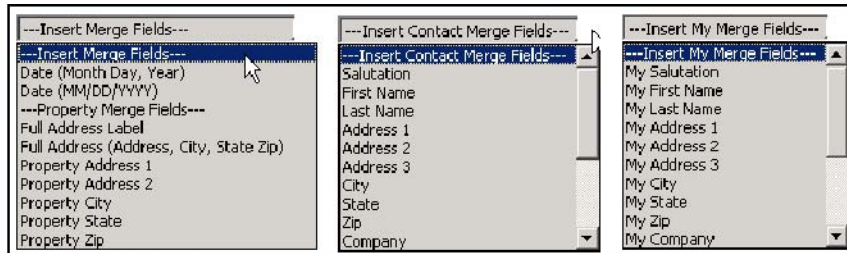
Save    Close

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

- Insert Merge Fields:** Date information and all information regarding the location of the property.
- Insert Contact Merge Fields:** All information regarding the client which includes their first name, last name, address, phone, etc.
- Insert My Fields:** All information regarding the TC or the full-access Agent in charge of

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

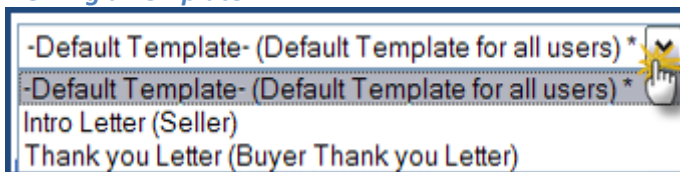
- d. **Start From Existing Templates:** Allows you to base the new template on an existing template.
- e. Use the toolbar for including features such as Bold, Italics, Underline, changing font size, changing font, changing font color, etc. The template creation toolbar is similar to the Microsoft Word 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.

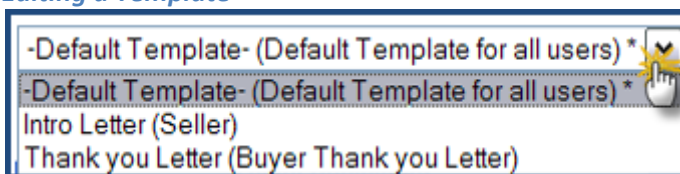
#### Viewing a Template



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

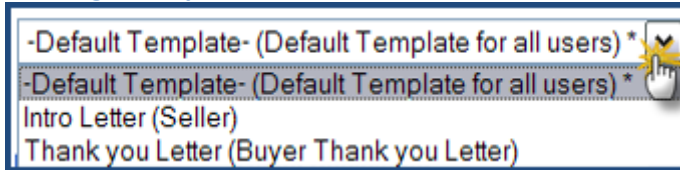
**Note:** You cannot make any changes to the template since it is open for read-only viewing.

#### 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

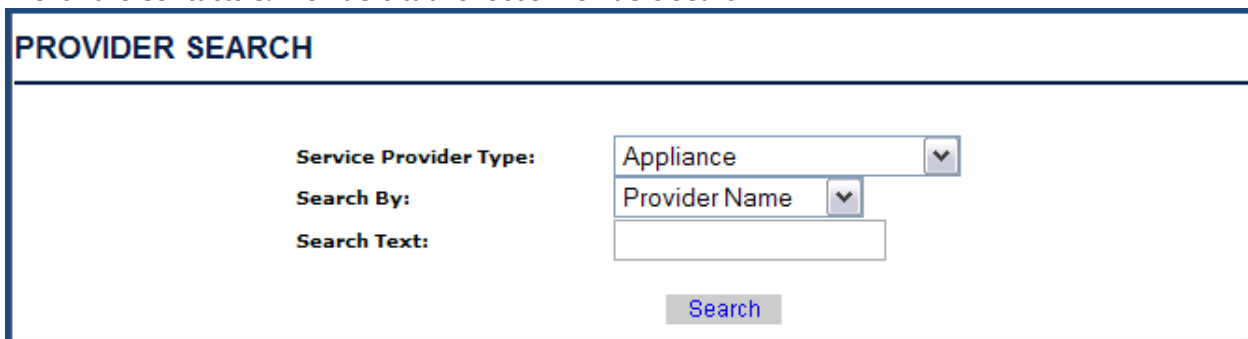


1. Select the template from the pull-down list.
2. Click **Delete**. A delete confirmation page appears.
3. Click **OK** to confirm the deletion of the selected template. The **Write Letter** page refreshes and the list of available templates is updated.

**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
<a href="#">Barney Frankford</a>	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.

The screenshot shows the Document Center interface. At the top, there is a navigation bar with links for Home, Mail, Calendar, FAQ, Help, and Logout. Below this is a main menu with tabs for Transactions, Orders, Properties, Contacts & Providers, Documents (selected), Reports, and Profile & Preferences. The main content area is titled "Document Center" and includes a "Download Document Management Tool" link and a help icon. The interface is divided into two main sections: "Transaction Documents" and "Inbox Documents".

**Transaction Documents**

Transactions: No transaction selected.

**Inbox Documents**

Move/Copy Remove

<input type="checkbox"/>	Document Name	Date		
<input type="checkbox"/>	<a href="#">buyer's agency disclosure 0518160136.pdf</a>	5/18/2009 4:01:37 PM (CDT)		
<input type="checkbox"/>	<a href="#">notes_0609141754.doc</a>	6/9/2008 2:18:00 PM (CDT)		
<input type="checkbox"/>	<a href="#">smoke_detector_statement_of_compliance_0425094322.pdf</a>	4/25/2008 9:43:28 AM (CDT)		

Move/Copy Remove

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.

### Document Center [Download Document Management Tool](#)

**Branch:** (\* Inactive Branches) **Agent:** (\* Inactive Agents)

FNRES Realty All Agents

**Agent Represents:** Show All **Status:** Show All **With:** Show All

**Other Filters:** Property Address

**Transaction Documents**

**Transactions:** 6707-6910 (22 Millburrow Lane Frisco, TX 75035)

<input type="checkbox"/>	Name	Pgs	Approved	Archive	Tracking #	Upload Date	Log	Privilege
<input type="checkbox"/>	<a href="#">Agency Disclosure</a>	4	<input type="checkbox"/>		6707-6910	1/7/2009 12:23:56 PM (CST)		
<input type="checkbox"/>	<a href="#">CC &amp; Rs</a>	5	<input type="checkbox"/>		6707-6910	1/7/2009 12:24:00 PM (CST)		
<input type="checkbox"/>	<a href="#">Listing Agreement &amp; Sellers Net Sheet</a>		<input type="checkbox"/>		6707-6910	2/24/2009 12:55:03 PM (CST)		
<input type="checkbox"/>	<a href="#">Publish price change</a>	1	<input type="checkbox"/>		6707-6910	2/23/2009 2:29:33 PM (CST)		
<input type="checkbox"/>	<a href="#">Seller's Disclosure Statement</a>		<input type="checkbox"/>		6707-6910	9/15/2008 1:50:01 PM (CDT)		
<input type="checkbox"/>	<a href="#">Signature Page</a>	1	<input type="checkbox"/>		6707-6910	1/7/2009 12:24:03 PM (CST)		

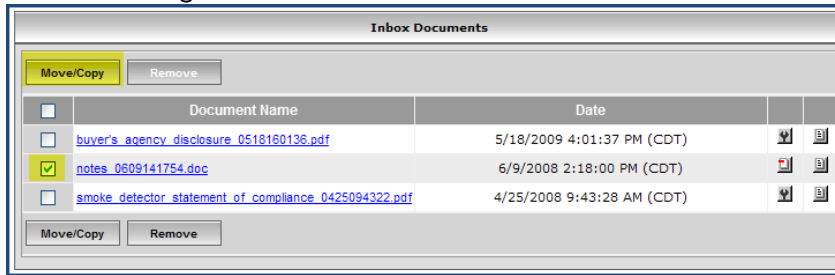
**Inbox Documents**

<input type="checkbox"/>	Document Name	Date		
<input type="checkbox"/>	<a href="#">buyer's agency disclosure 0518160136.pdf</a>	5/18/2009 4:01:37 PM (CDT)		
<input type="checkbox"/>	<a href="#">notes 0609141754.doc</a>	6/9/2008 2:18:00 PM (CDT)		
<input type="checkbox"/>	<a href="#">smoke detector statement of compliance 0425094322.pdf</a>	4/25/2008 9:43:28 AM (CDT)		



## 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.

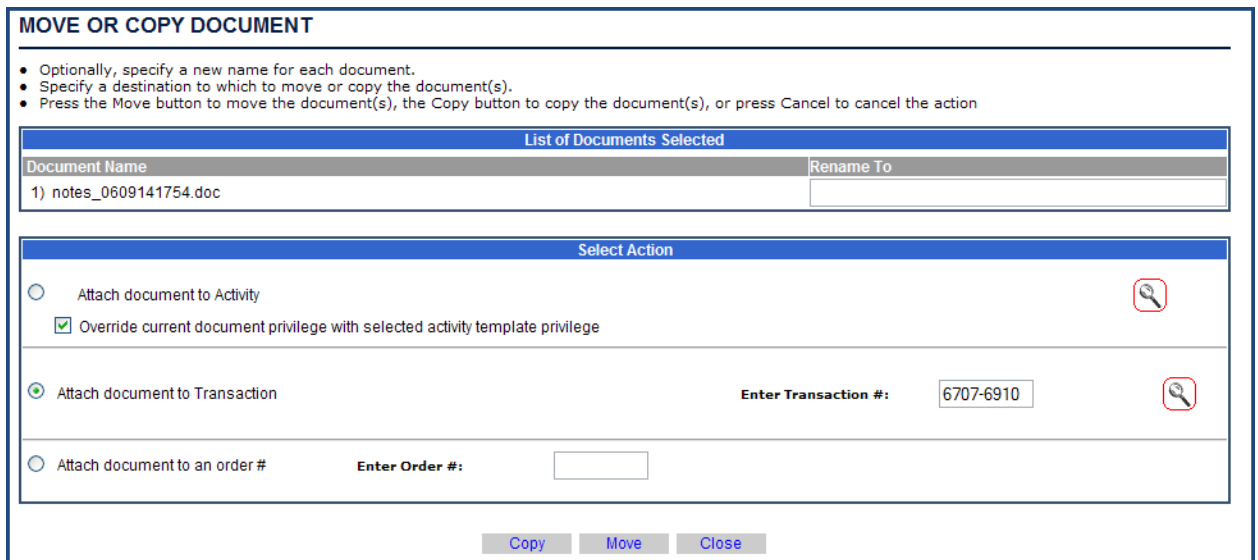


The screenshot shows a window titled "Inbox Documents". At the top, there are two buttons: "Move/Copy" (highlighted in yellow) and "Remove". Below this is a table with columns for "Document Name" and "Date".

	Document Name	Date		
<input type="checkbox"/>	<a href="#">buyer's_agency_disclosure_0518180136.pdf</a>	5/18/2009 4:01:37 PM (CDT)		
<input checked="" type="checkbox"/>	<a href="#">notes_0609141754.doc</a>	6/9/2008 2:18:00 PM (CDT)		
<input type="checkbox"/>	<a href="#">smoke_detector_statement_of_compliance_0425094322.pdf</a>	4/25/2008 9:43:28 AM (CDT)		

At the bottom of the window, there are two buttons: "Move/Copy" and "Remove".

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.



The screenshot shows a dialog box titled "MOVE OR COPY DOCUMENT". It contains the following elements:

- Instructions:
  - Optionally, specify a new name for each document.
  - Specify a destination to which to move or copy the document(s).
  - Press the Move button to move the document(s), the Copy button to copy the document(s), or press Cancel to cancel the action
- List of Documents Selected** table:

Document Name	Rename To
1) notes_0609141754.doc	
- Select Action** section:
  - Attach document to Activity
  - Override current document privilege with selected activity template privilege
  - Attach document to Transaction **Enter Transaction #:**
  - Attach document to an order # **Enter Order #:**
- Buttons: **Copy**, **Move**, **Close**

*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.

### Upload Document

You can upload a document (eg; PDF, Microsoft Word, text, TIF) for a Transaction and later move it to a Transaction Activity or an Order.

**Document Name:**

**Select File:**

**Document Security:**  Document is Public  Document is Private

**Include in Customized Archive:**  Yes  No

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.

**Transaction Documents**

Transactions:  ▼

Mail
Move/Copy
Privilege
Rename
Archive
Remove
Print

Upload Document

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

Mail
Move/Copy
Privilege
Rename
Archive
Remove
Print

Upload Document

## Report Center

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

**REPORTS**

Transaction Reports

[Branch Results](#)  
[Agent Results](#)  
[Activity Reports](#)

Document Reports

[Documents Received Report](#)  
[Documents Viewed Report](#)

### 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**

**Reports - Transactions Branch Results**

\*Branch:  ▼

\*Agent Status:  ▼

\*Agent Represents:  ▼

\*Transaction Status:  ▼

Date Range:  ▼ from  to

The **Branch Results** report appears

**Reports - Transactions Branch Results**

\*Branch:  ▼

\*Agent Status:  ▼

\*Agent Represents:  ▼

\*Transaction Status:  ▼

Date Range:  ▼ from  ▼ to  ▼

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	\$145,599.00 / \$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
<b>Total Transactions: 2</b>						<b>Total List Price: \$349,198.00</b>	<b>Total Sales Price: \$335,599.00</b>
<b>Branch: FNRES Realty - Shaw Team</b>							
No transactions							
<b>Branch: Your TC Pro</b>							
No transactions							
<b>Total Transactions of all branches: 2</b>						<b>Total List Price: \$349,198.00</b>	<b>Total Sales Price: \$335,599.00</b>
* 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**.

**Reports - Transactions By Agent**

\* **Branch:** All

\* **Agent Status:** All

\* **Agents:** All

\* **Agent Represents:** All

\* **Transaction Status:** All

**Date Range:** --Select-- from to **Go**

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

The **Agent Results** report appears

**Reports - Transactions By Agent**

\* **Branch:** All

\* **Agent Status:** All

\* **Agents:** All

\* **Agent Represents:** All

\* **Transaction Status:** All

**Date Range:** Transaction Opened from 01/01/2009 to 05/21/2009 **Go**

**Print**

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:**

**Agent Status:**

**Agent:**

**Agent Represents:**

**Transaction Status:**

**Activity Description:**

**Activity Status:**  Between  and

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

<input type="button" value="Print"/>					
<b>Branch Name: FNRES Realty</b>					
<b>Coordinator: Claire Coordinator</b>					
Trans #	Represents Status	Listing Date Listing Expiration Date	Estimated Closing Date Escrow Closing Date	Due	Completed
<b>Agent: Andrew Agent</b>					
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	
<i>5/14/2009 5:58:07 PM CDT, Claire Coordinator: Awaiting receipt from Title</i>					
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

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  to

Branch	Transaction Coordinator	Transaction Documents	Order Documents
FNRES Realty	Claire Coordinator	9	0
<b>Total Documents</b>		<b>9</b>	<b>0</b>

## Sample Detailed Report

### Documents Received Report

**Report Type:**       Summary Report       Detailed Report

**Date Range:**      from  to

Trans #	Property Address	Document Name	Document Type	Received Date
<b>Total Documents: 10</b>				
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)
<b>Total Documents: 10</b>				

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



## Creating a Documents Viewed Report

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

**Reports - Document Viewed**

* Branch:	- Select -	▼
* Agent Status:	All	▼
* Agent:	- Select -	▼
* Agent Represents:	All	▼
* Transaction Status:	All	▼
Other Filters:	- Select -	▼

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

## Sample Documents Viewed Report

**Expand All Transactions**

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)
⊕ Transaction 6707-6910 (22 Millburrow Lane, Frisco, TX 75035)
⊕ Transaction 7007-7210 (55 North Scott Road, McKinney, TX 75070)



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

### Reports - Document Viewed

\* **Branch:**

\* **Agent Status:**

\* **Agent:**

\* **Agent Represents:**

\* **Transaction Status:**

**Other Filters:**

**Expand All Transactions**

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: <input type="text"/>	Work Phone: <input type="text"/> *	Cell: <input type="text"/>
First Name: Claire*	Home Phone: <input type="text"/>	Domain: <input type="text"/>
MI: <input type="text"/>	Pager: <input type="text"/>	Voice Mail: <input type="text"/>
Last Name: Coordinator*	PIN: <input type="text"/> <input type="radio"/> Yes <input checked="" type="radio"/> No	Fax: <input type="text"/>

Example: 18001234567

A.K.A. First Name: <input type="text"/>	A.K.A. Last Name: <input type="text"/>
Website: <input type="text"/>	
Email 1: <input type="text"/>	If email address (Email 1) is not specified, email will be sent to the system email account.
Notify by: <input type="text"/> Email	
Email 2: <input type="text"/>	
Email 3: <input type="text"/>	<input checked="" type="checkbox"/> Select box to send notifications to all emails. If unchecked, notification will only be sent to primary email (1).
Email 4: <input type="text"/>	
Email 5: <input type="text"/>	

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:	connie.shaw@fnres.com

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 notifying 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. Click **Finished** when you are done updating your profile.

The screenshot shows a form for configuring email addresses. It includes fields for 'Email 1', 'Email 2', 'Email 3', 'Email 4', and 'Email 5'. A 'Notify by:' dropdown menu is set to 'Email'. A checkbox is checked, with the text: 'Select box to send notifications to all emails. If unchecked, notification will only be sent to primary email (1)'. A note next to the 'Email 1' field states: 'If email address (Email 1) is not specified, email will be sent to the system email account.'

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.

The screenshot shows a user profile card for a 'Transaction Coordinator'. The name is 'Coordinator, Claire - FNRES Realty'. The address is '9005 Amber Downs Drive, McKinney, TX 75070 USA'. The email is 'connie.shaw@fnres.com'. There are fields for 'Home:', 'Work: 972-346-7100', 'Cell:', 'Pager:', and 'Voice Mail:'. A 'URL:' field is also present. An envelope icon is shown next to the email address, and a tooltip displays 'connieshaw@yahoo.com'. There are 'Edit' and 'Create vCard' buttons.

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.

### Change Password

<b>Current Password:</b>	<input type="text"/>
<b>New Password:</b>	<input type="text"/>
<b>Confirm New Password:</b>	<input type="text"/>

### Assist a TC Password

Set up below a separate password which you can give to another Transaction Coordinator in you company to manage transactions for you in your absence.

<b>New Password for Assist a TC Function Only:</b>	<input type="text"/>
<b>Confirm New Password for Assist a TC Function Only:</b>	<input type="text"/>

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.

## Password Confirmation

Your password has been changed successfully!

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.

### Preferred Providers

**Branch:** FNRES Realty ▼

**Agent:** Andrew Agent ▼

**Inspection** Home Inspection ▼

**Closing** Select a service ▼

**Other Services** Select a service ▼

---

**Other Providers (Branch Preferred)**

[Barney Frankford, Bugs R Us Plus](#)

[Ben Garcia, Extreme Inspections - Tacoma Office](#)

---

**Other Providers**

[Charles Bradford, Course Inspections](#) Remove

Add Providers
Suggest Providers

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:

**Charles Bradford, Course Inspections**

---

**Contact Information**

Mailing Address	Registered Address
Course Inspections 2219 Stadium Road McKinney, TX 75070	Course Inspections 2219 Stadium Road McKinney, TX 75070

---

**Service Coverage Area (County, State)**

ORANGE, CA	SAN JOAQUIN, CA	BARNSTABLE, MA
BERKSHIRE, MA	BRISTOL, MA	DUKES, MA
ESSEX, MA	FRANKLIN, MA	HAMPDEN, MA
HAMPSHIRE, MA	MIDDLESEX, MA	NANTUCKET, MA
NORFOLK, MA	PLYMOUTH, MA	SUFFOLK, MA
WORCESTER, MA	BERRIEN, MI	CASS, MI
VAN BUREN, MI	LINCOLN, MT	COLLIN, TX
DALLAS, TX	DENTON, TX	

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**Services Offered**

Asbestos Inspection	Chimney Inspection	Foundation Inspection
Geo/Tech Inspection	Heat/Air Inspection	Home Inspection
Lead/Paint Inspection	Mold Inspection	Pest Control Inspection

---

**Office Hours**

Not Available

---

**Licenses Held**

Not Available

---

**Photo Information**

Not Available

---

**Experience**

Not Available

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.

The screenshot shows the 'Packet Services' page. It is divided into two main sections: 'My Packet Services' and 'Real Estate Agent Packet Services'.  
The 'My Packet Services' section has a header bar. Below it, there is a 'Packet Services List' dropdown menu currently set to 'More and More Team'. To the right of this dropdown are two buttons: 'Create a New List' and 'Delete List'. Below these buttons, the 'Contact Type' is set to 'Appraisal'. Underneath, the 'Contact Info' is 'Phil Acme - Acme Appraisal', with a 'Remove' button next to it. At the bottom right of this section is an 'Add to List' button.  
The 'Real Estate Agent Packet Services' section also has a header bar. Below it, there are two dropdown menus: 'Branch Office' set to 'All' and 'Real Estate Agent' set to '--Select--'. Below these is a 'Packet Services List' dropdown menu which is currently empty, with the text 'No Packet Services available' displayed. To the right of this dropdown are two buttons: 'Create a New List' and 'Delete List'. At the bottom right of this section is an 'Add to List' button.

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

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

The screenshot shows the 'Create New Packet Services List' dialog box. It has a title bar and a close button. The dialog contains several input fields and buttons:  
- At the top, there are three buttons: 'Add New Company', 'Select', and 'Cancel'.  
- Below these is a 'Name of List:' text input field.  
- Next is a 'Contact Type:' dropdown menu set to 'APPRAISAL'.  
- Below that is a 'Providers:' dropdown menu set to 'Show Preferred Only'.  
- At the bottom, there is a 'Search for:' dropdown menu set to 'First Name', followed by a text input field and a 'Search' button.  
- At the very bottom, there are three buttons: 'Add New Company', 'Select', and 'Cancel'.

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

Add New Company    Select    Cancel

Name of List:

Contact Type:

Providers:

Search for:

**Contacts**

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

★ Indicates "Preferred Provider"

✓ Indicates "Agent Preferred"

▲ Indicates "My Packet Services"

● Indicates "Agent's Packet Services"

Add New Company    Select    Cancel

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 1<sup>st</sup> 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.

The screenshot displays the 'Packet Services' interface. It is divided into two main sections:

- My Packet Services:** This section shows a 'Packet Services List' with a dropdown menu currently set to 'More and More Team'. To the right of this dropdown are buttons for 'Create a New List' and 'Delete List'. Below this, the 'Contact Type' is set to 'Appraisal', and the 'Contact Info' is 'Phil Acme - Acme Appraisal', with a 'Remove' button next to it. An 'Add to List' button is located at the bottom right of this section.
- Real Estate Agent Packet Services:** This section features a 'Branch Office' dropdown set to 'All' and a 'Real Estate Agent' dropdown set to '--Select--'. Below these are 'Create a New List' and 'Delete List' buttons. The text 'No Packet Services available' is displayed, and an 'Add to List' button is at the bottom right.

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

Add New Company
Select
Cancel

Name of List:

Contact Type:

Providers:

Search for:

**Contacts**

Company	Branch	Contact(s)
Bugs R Us Plus	Bugs R Us Plus 4218 Miller Avenue McKinney, TX 75070	<input type="radio"/> Barney Frankford ★
<input type="button" value="Add Branch"/>	<input type="button" value="Add Contact"/>	<input type="button" value="Select"/>
Course Inspections	Course Inspections 2219 Stadium Road McKinney, TX 75070	<input type="radio"/> Charles Bradford
<input type="button" value="Add Branch"/>	<input type="button" value="Add Contact"/>	<input type="button" value="Select"/>
Extreme Inspections	Extreme Inspections - Tacoma Office 9205 Valley View Tacoma, WA 98422	<input type="radio"/> Ben Garcia ★
<input type="button" value="Add Branch"/>	<input type="button" value="Add Contact"/>	<input type="button" value="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 1<sup>st</sup> Title. To avoid duplicate entry, be sure to search all possible results before adding new companies, branches or users.

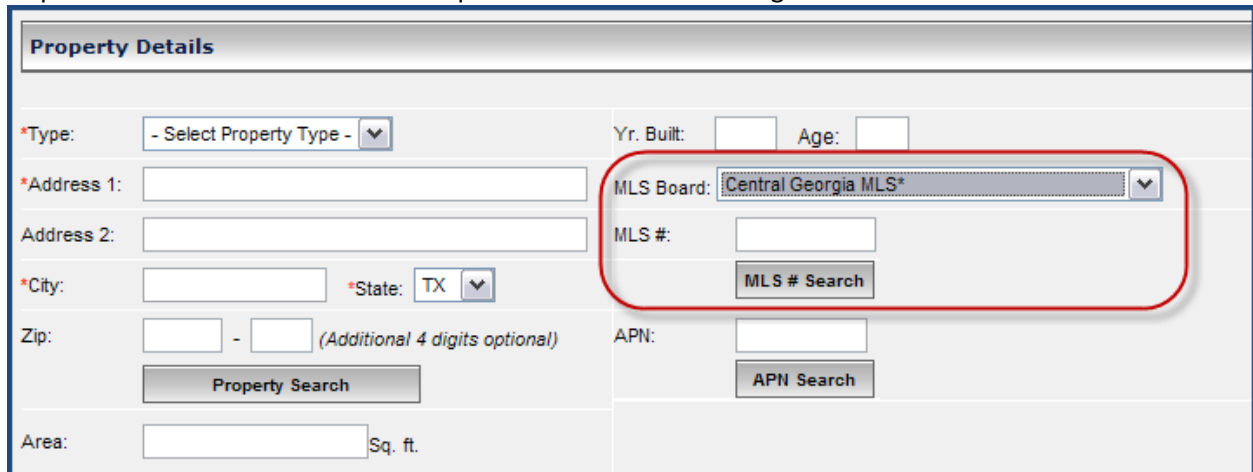
**Note:** My Packet Services will be available in every transaction you have created. Real Estate Agent Packet Services will be available only when the agent is the primary agent in a transaction you have created.

## 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.

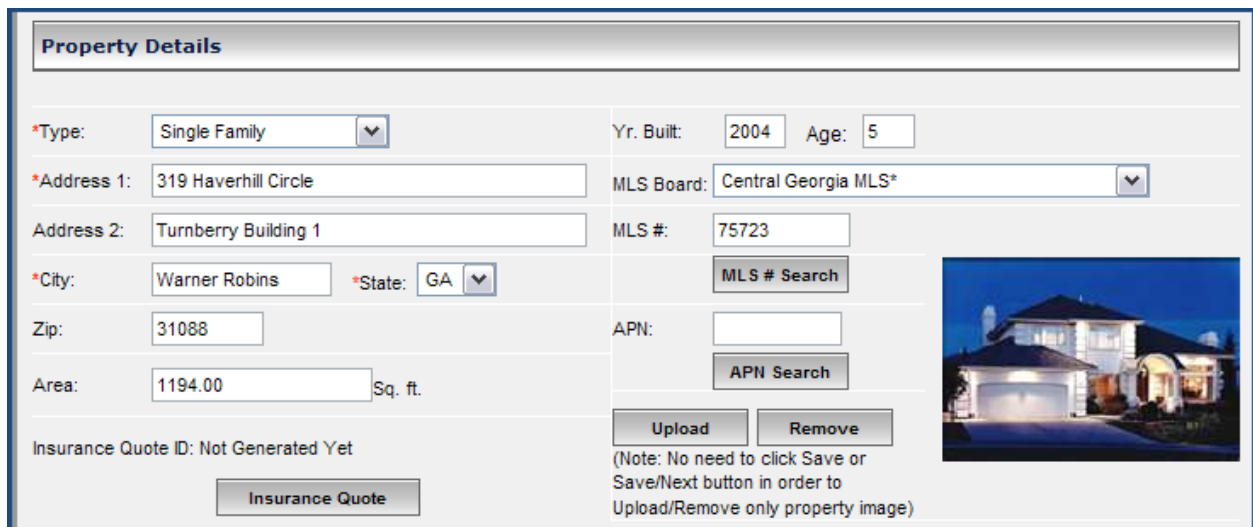
### Importing Information from the MLS

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



The screenshot shows the 'Property Details' form. The 'MLS Board' dropdown menu is set to 'Central Georgia MLS\*' and the 'MLS #' field is empty. A red box highlights these two fields and the 'MLS # Search' button below them. Other fields include: \*Type: - Select Property Type -; Yr. Built: [ ]; Age: [ ]; \*Address 1: [ ]; Address 2: [ ]; \*City: [ ]; \*State: TX; Zip: [ ] - [ ] (Additional 4 digits optional); APN: [ ]; Area: [ ] Sq. ft. Buttons for 'Property Search' and 'APN Search' are also visible.

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.

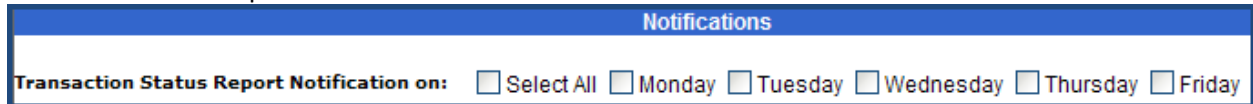


The screenshot shows the 'Property Details' form with populated data. The 'MLS Board' dropdown menu is set to 'Central Georgia MLS\*' and the 'MLS #' field is populated with '75723'. A red box highlights these two fields and the 'MLS # Search' button below them. Other fields include: \*Type: Single Family; Yr. Built: 2004; Age: 5; \*Address 1: 319 Haverhill Circle; Address 2: Turnberry Building 1; \*City: Warner Robins; \*State: GA; Zip: 31088; APN: [ ]; Area: 1194.00 Sq. ft. Buttons for 'MLS # Search', 'APN Search', 'Upload', and 'Remove' are visible. A property photo is shown on the right. At the bottom, there is an 'Insurance Quote' button and a note: '(Note: No need to click Save or Save/Next button in order to Upload/Remove only property image)'. The 'Insurance Quote ID' is 'Not Generated Yet'.

**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)

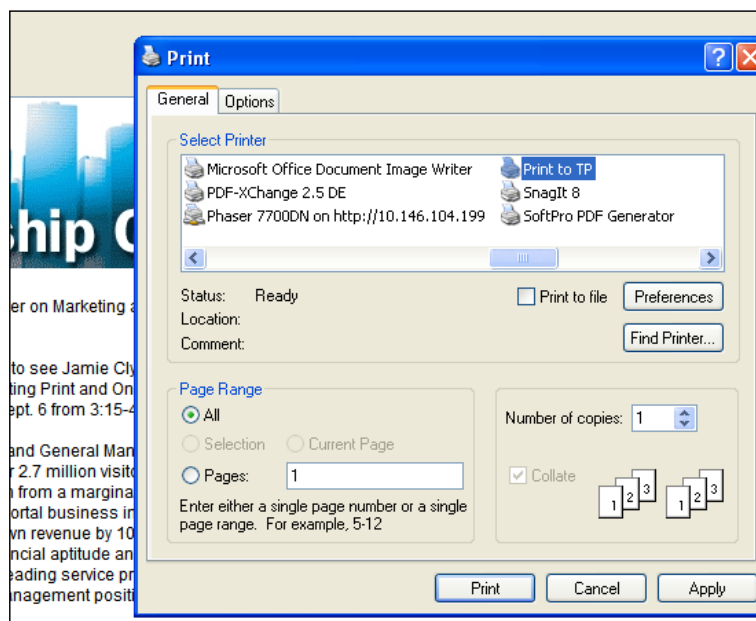
The DML was designed to allow the Transaction Coordinator or Full Access agent with an ability to upload multiple documents at once to a transaction, activity or order. The DML also includes a TP Printer that allows the user to **Print to TP** rather than printing to their respective printers. Users 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 issued 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.'

**Login**

User Name :

Password :

Site URL :  ?

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.

**Document Management Live v1.1**

ONE SOURCE. POWERFUL SOLUTIONS.

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NATIONAL REAL ESTATE SOLUTIONS

Dashboard

5356-5565 (2510 Red Hill Ave, Santa Ana, CA 92705)

**Property Address :** 2510 Red Hill Ave, Santa Ana, CA 92705

**Transaction ID :** 5356-5565

**Represents/Status :** Both/Closed

\* Pre-Sale, Pending and Closed transactions are displayed

Look at all transaction documents.

You can select the transaction from the dropdown

Or you can search for the transaction.

Upload document(s) to :

Transaction

Convert document(s) to PDF

You can convert to a PDF first.

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 #:	<input type="text"/> (* This is a required field)
Choose the service	
<input type="radio"/> Natural Hazard Disclosure Report (NHD)	<input type="radio"/> Environmental Disclosure Report
<input type="radio"/> All - NHD, Environmental, Tax Disclosure	<input type="radio"/> Both NHD and Environmental <input type="radio"/> Tax Disclosure
C.L.U.E Risk Report	
<input type="checkbox"/> 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	
<input type="button" value="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.

External System Details			
External System	External ID	Username	Password
AGENTOFFICE:	<input type="text"/>	<input type="text"/>	<input type="text"/>
DocCentral:	<input type="text"/> (MLS Agent ID)	dagent1	••••
* DocCentral Site Name:		<input type="text" value="http://stage.doccentral.trpoint.com/?pmls"/>	

## 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.

The screenshot shows a web interface titled "Transaction Documents". At the top, there is a header bar with a minus sign icon and the text "Transaction Documents". Below this is a row of action buttons: Mail, Move/Copy, Privilege, Rename, Archive, Remove, Print, Upload, and DocCentral. Underneath is a table with columns: Name, Pgs, Approved, Archive, Tracking#, Upload Date, Log, and Privilege. A single row is visible with the text "Copy of Check", a small icon, a checkbox, and the value "6448-6651 2/15/2008 11:57:07 AM (PST)". Below the table is another row of action buttons: Mail, Move/Copy, Privilege, Rename, Archive, Remove, Print, Upload, and DocCentral.

## 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.

The screenshot shows a dialog box titled "IMPORT DOCUMENTS FROM DOCCENTRAL". It contains the following information:

Transaction #: 20763-21549  
 Property: 999 El Camino Real, Santa Ana, CA 92705

**ACTIVE DOCCENTRAL FILES**

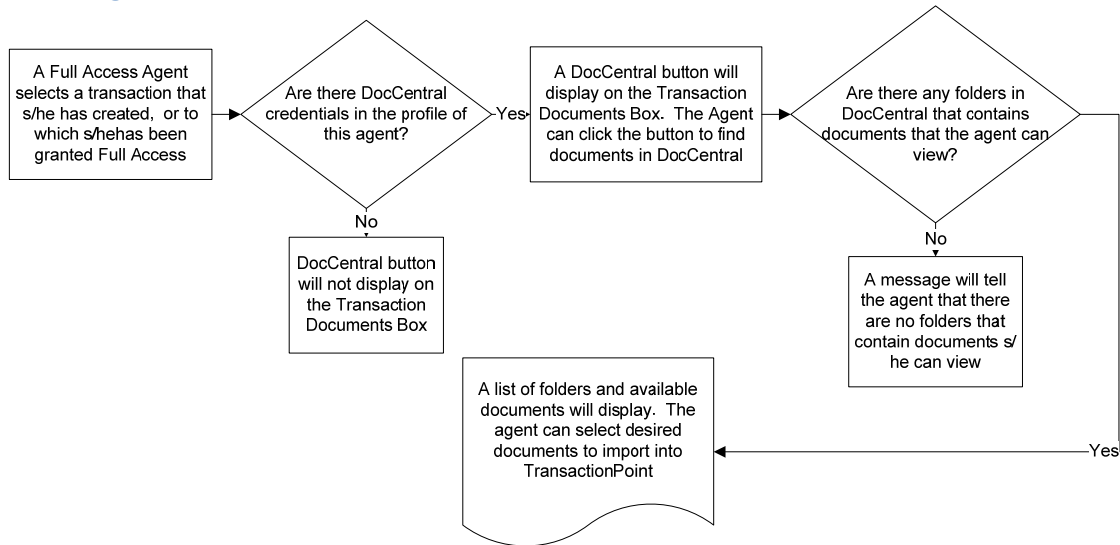
Select	ID#	ADDRESS1	ADDRESS2	CITY	STATE	ZIP
<a href="#">Select</a>	214	108 Main St		Santa Ana	CA	92705
<a href="#">Select</a>	213	999 El Camino Real		Santa Ana	CA	92705
<a href="#">Select</a>	212	666 Market St		Santa Ana	CA	92705
<a href="#">Select</a>	211	333 Test Ave		Sunnyvale	CA	94086
<a href="#">Select</a>	204	222 Test St. (DemoTC owner)		Irvine	CA	92612
<a href="#">Select</a>	202	111 Elcamino Real (Agent)		Santa Ana	CA	92705

**DOCUMENTS AVAILABLE IN DOCCENTRAL**

Select	TITLE	POSTED	SIZE
<input type="checkbox"/>	Environmental Disclosure Report	8/27/2008 2:39:34 PM	70165
<input type="checkbox"/>	Residential Purchase Agreement	8/27/2008 2:39:12 PM	70165

At the bottom of the dialog box are two buttons: "Submit" and "Cancel".

## 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.)

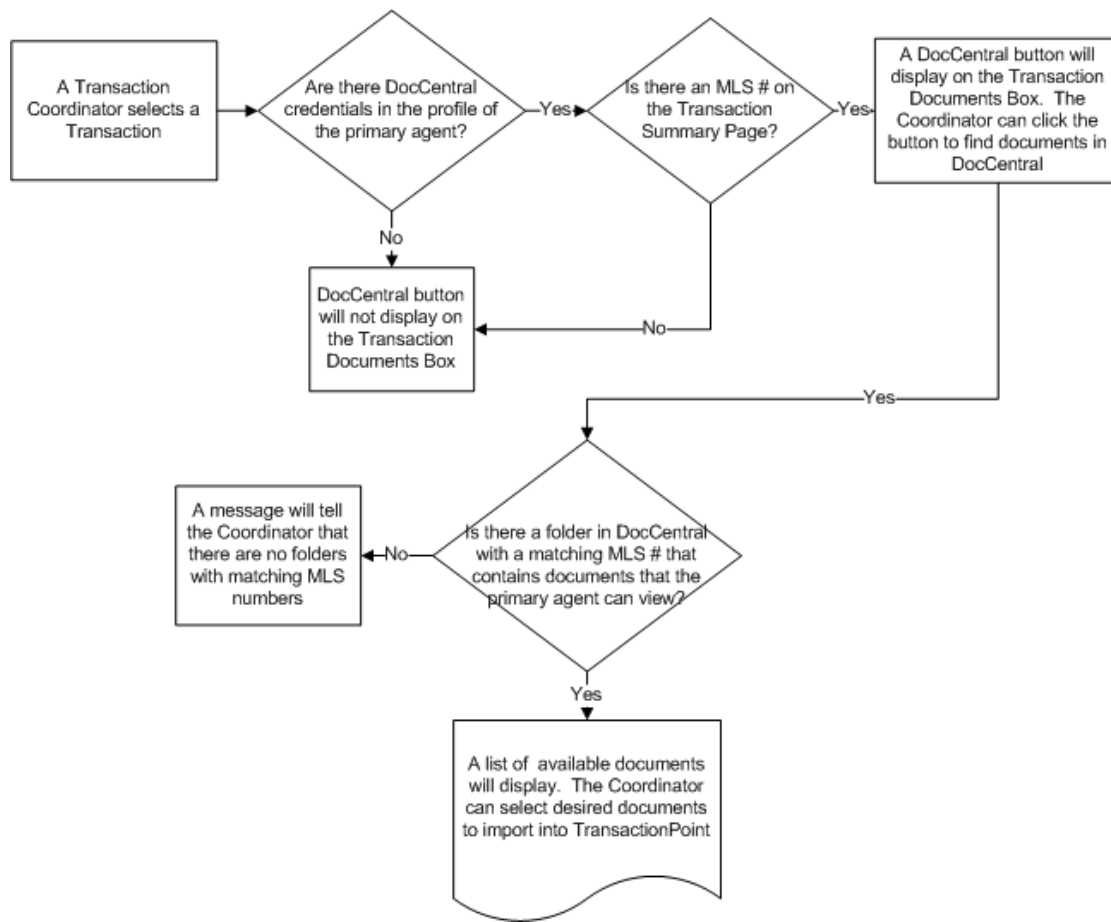
**IMPORT DOCUMENTS FROM DOCCENTRAL**

Transaction #: 11766-11244  
 Property: 123 market place , sunnyvale, CA  
 MLS #: 8049

DOCUMENTS AVAILABLE IN DOCCENTRAL			
DocCentral File ID#: 203			
DocCentral Property: 123 Market Pl , Sunnyvale, CA 94086			
Select	TITLE	POSTED	SIZE
<input type="checkbox"/>	Residential Purchase Agreement	9/16/2008 8:09:55 AM (PDT)	93k
<input type="checkbox"/>	CC & R's	9/16/2008 8:09:30 AM (PDT)	12k

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

## Transaction Coordinator Workflow

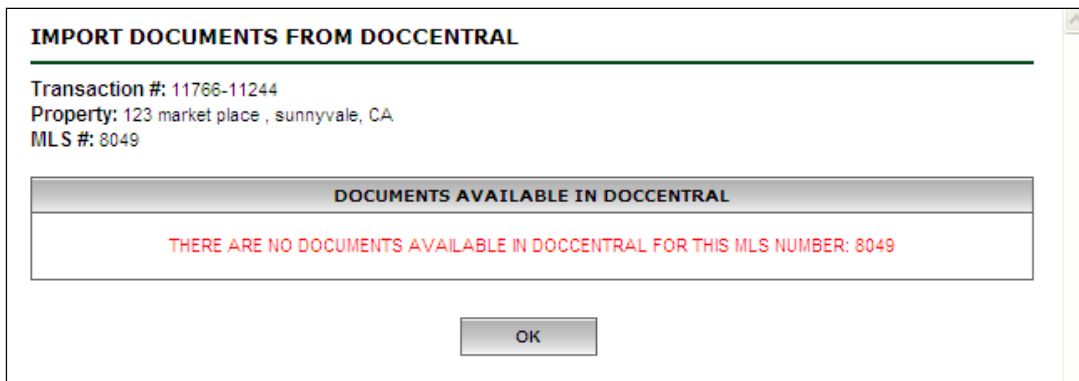


### Viewing Privilege of Imported Documents

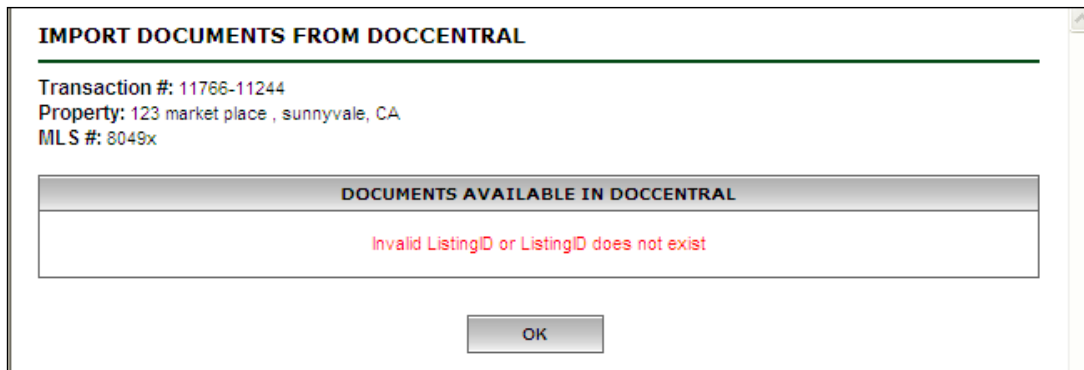
If the viewing privilege of the document imported from DocCentral is 'Public' then the privilege in TransactionPoint will be 'Public.' If the viewing privilege of the document imported from DocCentral is 'Private', the privilege of the document in TransactionPoint will be 'Private.' Privileges assigned 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.

The image shows a screenshot of the 'Transaction Details' page. The page contains various fields for transaction information, including Agent, Listing Date, Contract Acceptance Date, Estimated Closing Date, Listing Price, and Sale Price. The DPN ID: 1805507 is circled in red in the bottom right corner of the page.

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.'

Home | Help | Organization | Site Settings | Template Settings | Contacts | Agents | **Account** | Profiles & Preferences

Account Documents  
Transaction Data Feed  
Settings

**SITE CONFIGURATION**

**Notification**

Create Transaction Notification to Agents:  Disable  Enable

Fee Document Notification to YC:  Disable  Enable

Email Document Notification to YC:  Disable  Enable

Review Upload Document Notification to YC:  Disable  Enable

**Transactions**

Enable Archive Center for Agents:  Disable  Enable

**Document Options**

Users can remove documents:  Yes  No

**External System Integrations**

Enable Insurance Quote:  Disable  Enable

Notify by e-mail when a file is sent to DPN:  Yes  No  
(E-Mail addresses must be separated by a comma)

carol.waring@trpoin.com user@qamarketresearch.com

**E-Mail Notification**

From: service@trpoin.com  
 To: Waring, Carol; carol.waring@trpoin.com  
 Cc:   
 Subject: Files sent to DPN

Sent: Wed 11/5/2008 8:00 PM

The following files have been sent to DPN from TransactionPoint and are available for import.

Transaction Number	Sales Type	Sent	Status	Property Address
67514864	NEW_CONSTRUCTION	11/5/2008 6:10:42 PM (CST)	Pending	1337 Buttercup Drive Irvine CA 92612

http://qa.trpoin.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.'



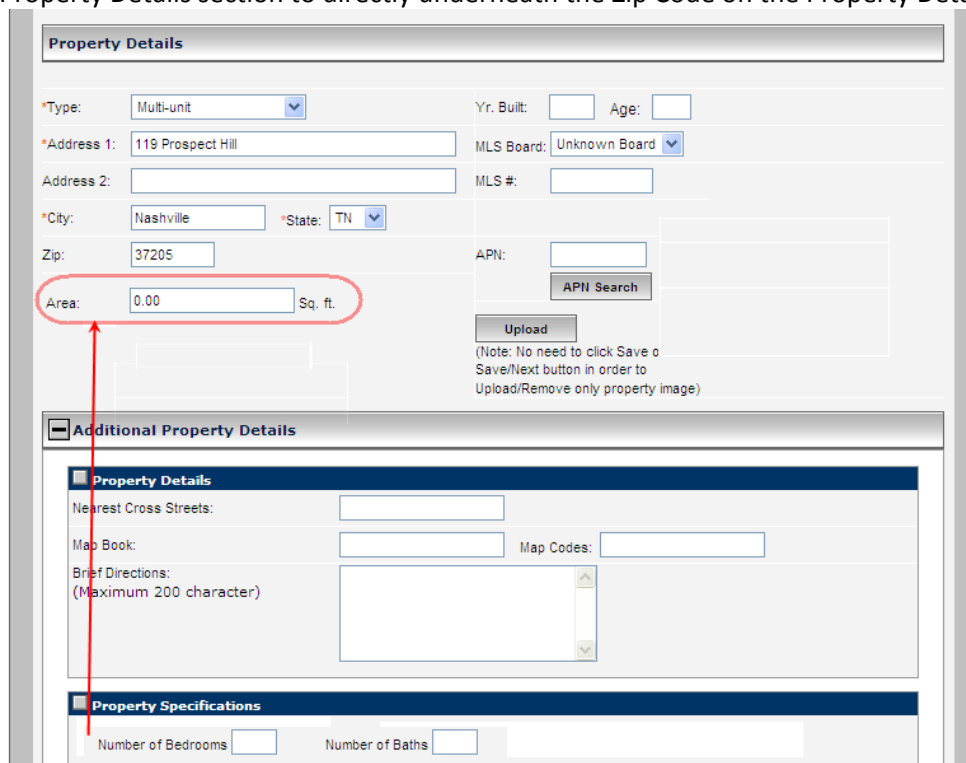
**Insurance Quote**

Enable Insurance Quote:  Disable  Enable

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.



**Property Details**

\*Type: Multi-unit Yr. Built: Age:

\*Address 1: 119 Prospect Hill MLS Board: Unknown Board

Address 2: MLS #:

\*City: Nashville \*State: TN

Zip: 37205 APN: APN Search

Area: 0.00 Sq. ft. Upload

(Note: No need to click Save or Save/Next button in order to Upload/Remove only property image)

**Additional Property Details**

**Property Details**

Nearest Cross Streets:

Map Book: Map Codes:

Brief Directions: (Maximum 200 character)

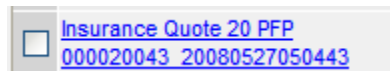
**Property Specifications**

Number of Bedrooms: Number of Baths:

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.

A screenshot of a web form titled "Property Details". The form contains various input fields for property information. At the bottom left, the text "Insurance Quote ID: 20 PFP 000020645" is displayed, and below it is a button labeled "Insurance Quote". A red circle highlights the text and the button. Other fields include "Type" (Single Family), "Yr. Built" (1974), "Age" (34), "Address 1" (240 Red Hill), "MLS Board" (Unknown Board), "City" (Santa Ana), "State" (CA), "Zip" (92705), "Area" (2250.00 Sq. ft.), and "APN". There are also buttons for "APN Search" and "Upload". A note at the bottom right says: "(Note: No need to click Save or Save/Next button in order to Upload/Remove only property image)".

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.

**Property Details**

\*Type:  Yr. Built:  Age:

\*Address 1:  MLS Board:

Address 2:  MLS #:

\*City:  \*State:

Zip:  APN:

Area:  Sq. ft.

Insurance Quote ID: Not Generated Yet

(Note: No need to click Save or Save/Next button in order to Upload/Remove only property image)

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.

**YOUR ORDER IS ACCEPTED**

Type : Home warranty  
 Order# : [7042-7271](#)  
 Property Address : 12 Cabrini  
 Irvine, CA 92614  
 Service Provider : Phil Homee  
 Phone# :  
 Fax# :  
 Email# : [dispatcher@smithwarranty.com](mailto:dispatcher@smithwarranty.com)  
 Company : New Home Warranty  
 Accepted By : Phil Homee  
 Ordered For : Buyer  
 Contract # : F3854906

Client: Mark Smith  
 Ordered For: Buyer  
 Agent: John Smith  
 Status: Order Accepted  
 Price: \$425.00

Order Date: 12/1/2008 1:00:44 PM (PST)  
 Order Placed By: Test TC1  
 Contract #: F3854906

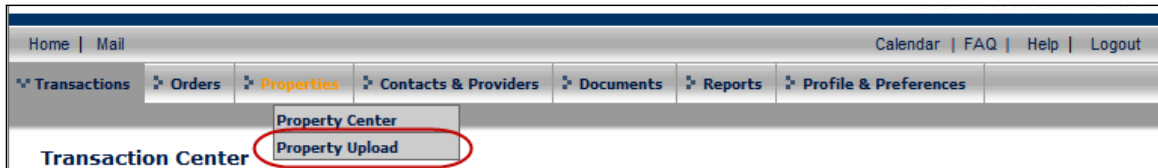


# Property Upload

## Overview

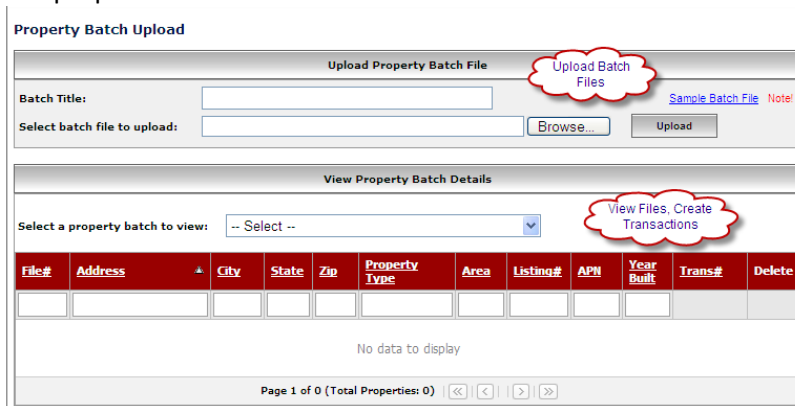
For those users who have large volumes of properties for which they would like to create transactions, a Property Upload feature has been added to TransactionPoint®. This will be valuable for new condo construction, rehabs, or any other volume transactions.

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.

FILE_NUMBER	ADDRESS1	ADDRESS2	CITY	STATE	ZIP	PROPERTY_TYPE
CB112233	189 PROPERTY AVE	999	SUNNYVALE	CA	94086	APT
CB23789	111 Elcamino Real		SUNNYVALE	CA	94086	SFY
CB1123189	2523 Market St		San Jose	CA	94087	SFA
CB23789	1899 Main St	189	Cupertino	CA	94085	
CB23789	989 South St		Sunnyvale	CA	94086	

APT - Apartment  
COP - Co-op  
COM - Commercial  
CON - Condominium  
DUX - Duplex  
FRM - Farm  
FRX - Fourplex  
HAX - Halfplex  
LAN - Land  
LOT - Lot  
MOH - Mobile Home  
MUL - Multi-unit  
OTH - Others  
PUD - PUD  
RAN - Ranch  
SF - Single Family  
SFD - Single Family Detached  
SFA - Single Family Attached  
TOH - Townhouse  
TRX - Triplex

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.'

### Property Batch Upload

Upload Property Batch File

**Batch Title:**  [Sample Batch File](#) Note!

**Select batch file to 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.

Upload Property Batch File

**Batch Title:**  [Sample Batch File](#)

**Select batch file to upload:**

The system uploaded the property batch file. [Click here to view the upload log.](#)

http://stage.trpoint.com//TPFiles/Sites/13/Uploaded\_Docs/Data\_Upload/Logs/propertyu...

Property Upload Log for the Batch: November 5 upload

```

-----
Row# 1: Property uploaded successfully.
Row# 2: Property uploaded successfully.
Row# 3: Property uploaded successfully.
Row# 4: Property not uploaded. Error - ADDRESS1 not entered; CITY not entered;
Row# 5: Property not uploaded. Error - CITY not entered; STATE not entered;
Row# 6: Property not uploaded. Error - STATE not entered;
Row# 7: Property uploaded successfully.

```

### 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: <input type="text" value="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	<a href="#">Create</a>	✕
CB112233	189 PROPERTY AVE 999	SUNNYVALE	CA	94086	Apartment	1200	L178299	A336699	1992	<a href="#">Create</a>	✕
CB23789	1899 Main St 189	Cupertino	CA	94085	Apartment	3900			1992	<a href="#">Create</a>	✕
CB1123189	2523 Market St	San Jose	CA	94087	Single Family Attached	3900			1992	<a href="#">Create</a>	✕
CB23789	989 South St	Sunnyvale	CA	94086	Condominium	2700			1992	<a href="#">Create</a>	✕

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: <input type="text" value="- 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			<a href="#">Create</a>	✕
TEST2 39502	123 Main Street #200	Tampa	FL	33626	Single Family	3500	U359860	456-871-52	1956	<a href="#">11771-11249</a>	✕
TEST2 39502	123 Main Street #200	Tampa	FL	33626	Single Family	3500	U359860	456-871-52	1956	<a href="#">Create</a>	✕
CB23789	1899 Main St 189	Cupertino	CA	94085	Apartment	3900			1992	<a href="#">Create</a>	✕
CB23789	1899 Main St 189	Cupertino	CA	94085	Apartment	3900				<a href="#">Create</a>	✕

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: ✕. 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.

### REPORTS

**Transaction Reports**

[Branch Results](#)  
[Agent Results](#)  
[Activity Reports](#)

**Document Reports**

[Documents Viewed Report](#)

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.

#### Reports - Document Viewed

* Branch:	- Select -	▼
* Agent Status:	All	▼
* Agents:	- Select -	▼
* Agent Represents:	All	▼
* Transaction Status:	All	▼
Other Filters:	- Select -	▼

---

User: Darlene Potter      Copyright © 2002      Site Name: tppro

**TransactionPoint**      [Privacy Policy](#)      Powered by Fidelity National Real Estate Solutions

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.

Expand All Transactions           

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

**Reports - Document Viewed**

- ⊕ Transaction 11683-11161 (16 Reservoir Street, Santa Ana, CA 92705)
- ⊕ Transaction 11689-11167 (2125 Harden Blvd, Beverly Hills, CA 90210)
- ⊕ Transaction 11691-11169 (44125 Harden Blvd, Beverly Hills, CA 90210)
- ⊕ Transaction 1908-2122 (10522 W Earl Dr , Anaheim, CA )



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)					

