# TransactionPoint®

## Version 17.0 – Sept. 6, 2013

## Release Notes

TransactionPoint®
From Real Estate Digital

# Contents

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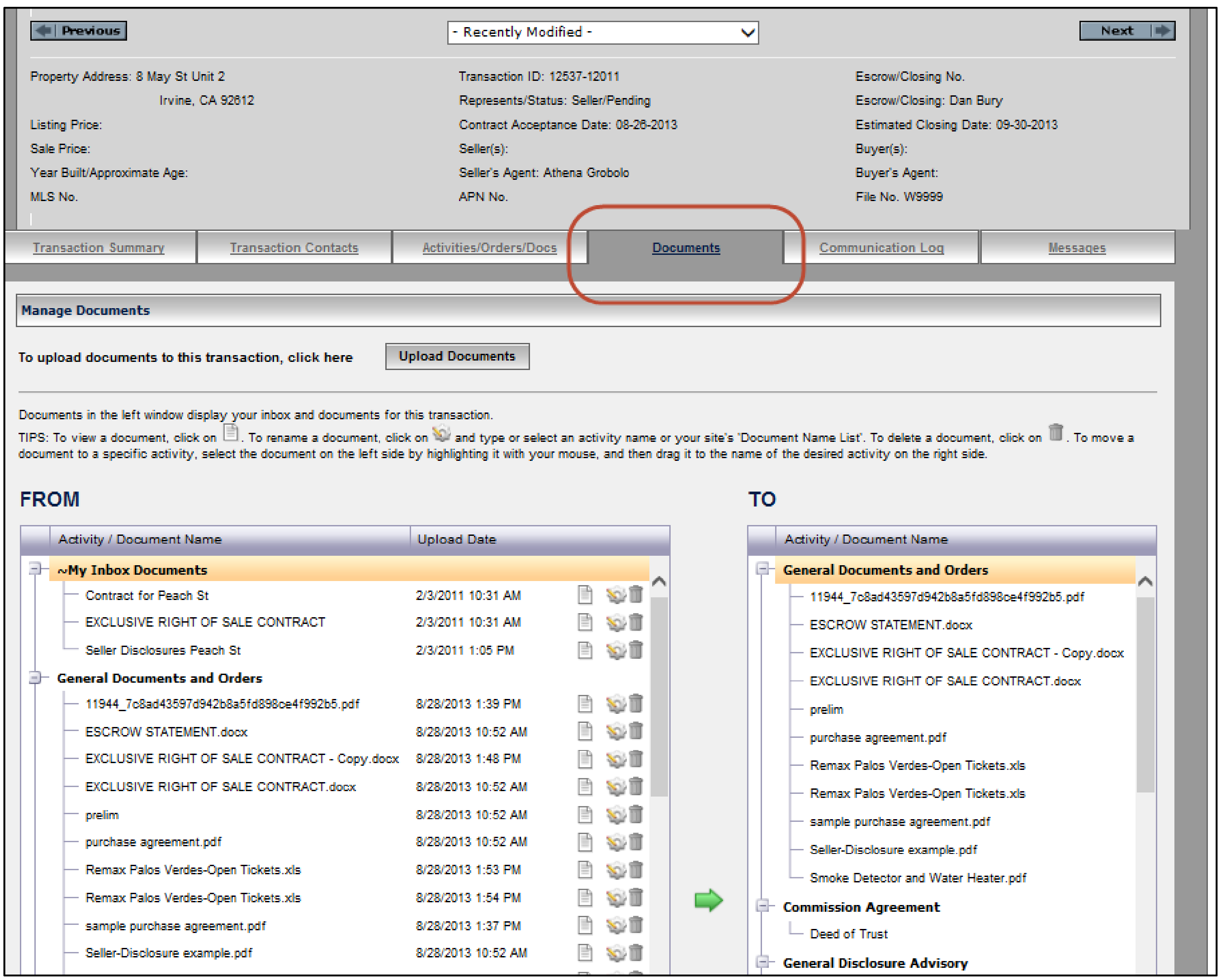
# Drag and Drop is here!

Drag documents from your desktop or hard drive to General Documents and Orders!
Drag documents within a transaction to an activity!
View documents, rename and remove documents!

It’s the next step in fast and easy document management and available for Transaction Coordinators and Full Access Agents.

## *The Transaction Documents Tab*

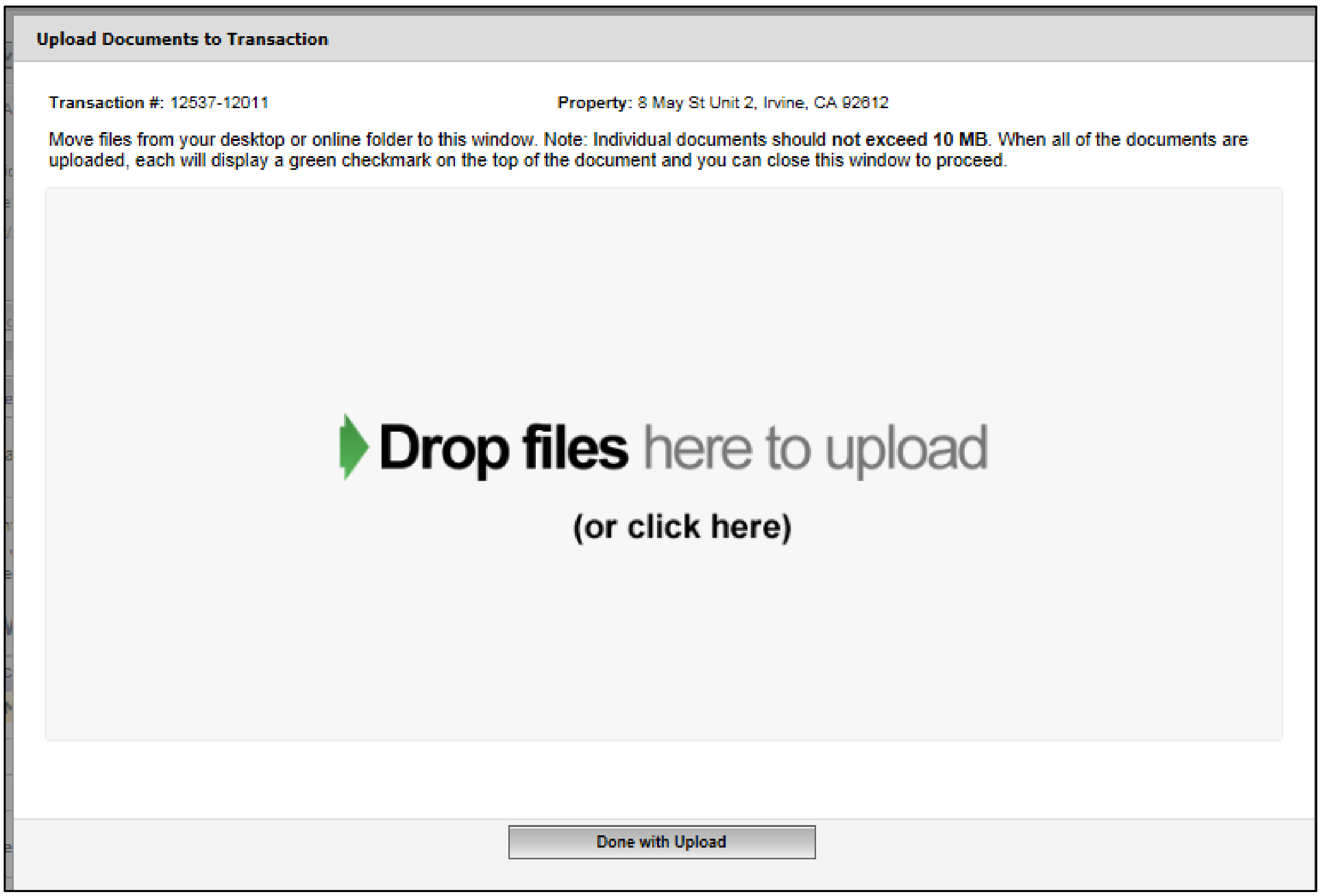
The Transaction Documents Tab provides access to the Upload and Drag and Drop functionality.



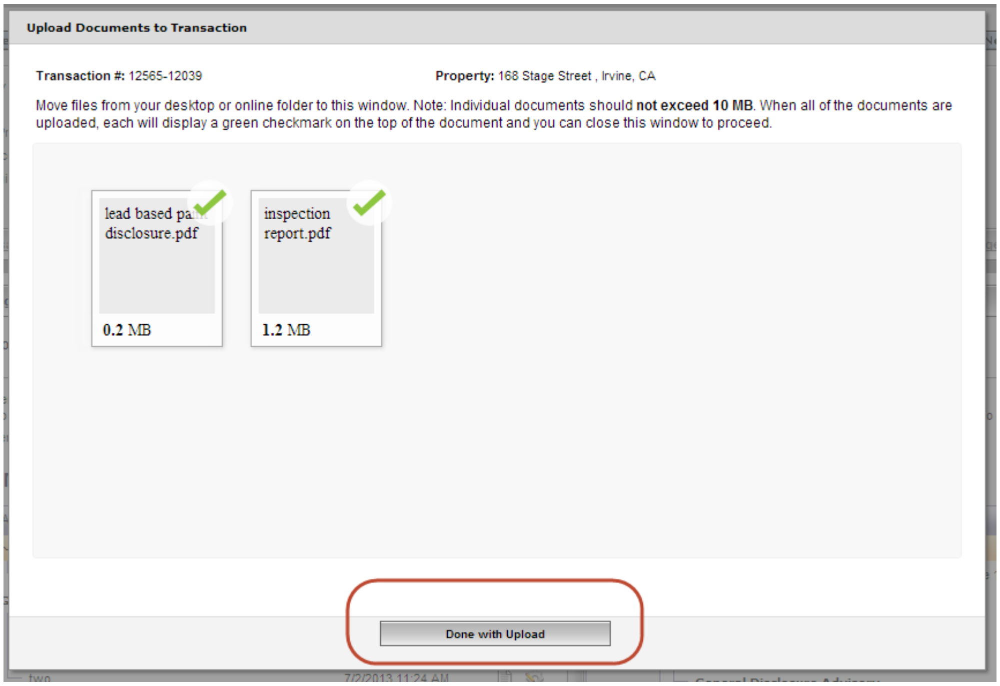
## *Adding Documents to a Transaction*

To add documents from your hard drive or desktop to the transaction's 'General Documents and Order's activity, click on the 'Upload Documents' button.


The window that opens will vary slightly depending on your browser. If you are using Chrome, Firefox or Internet Explorer 10 with the compatibility feature turned off, the next screen will appear as shown below and you can drag documents into the window. Documents cannot exceed 10MB in size.

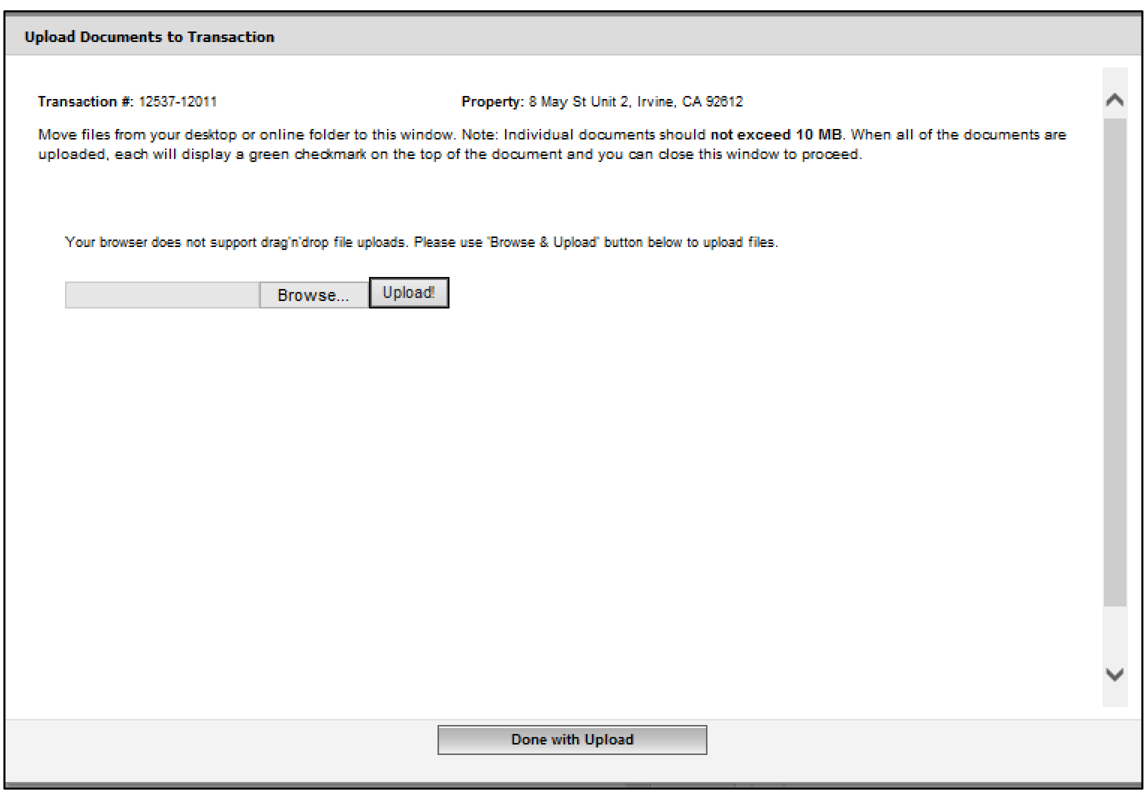



When the documents you've dragged to the window are done, a green check will appear on the top of each document to indicate that the upload is complete.




When all the documents display checkmarks, click 'Done with Upload.'

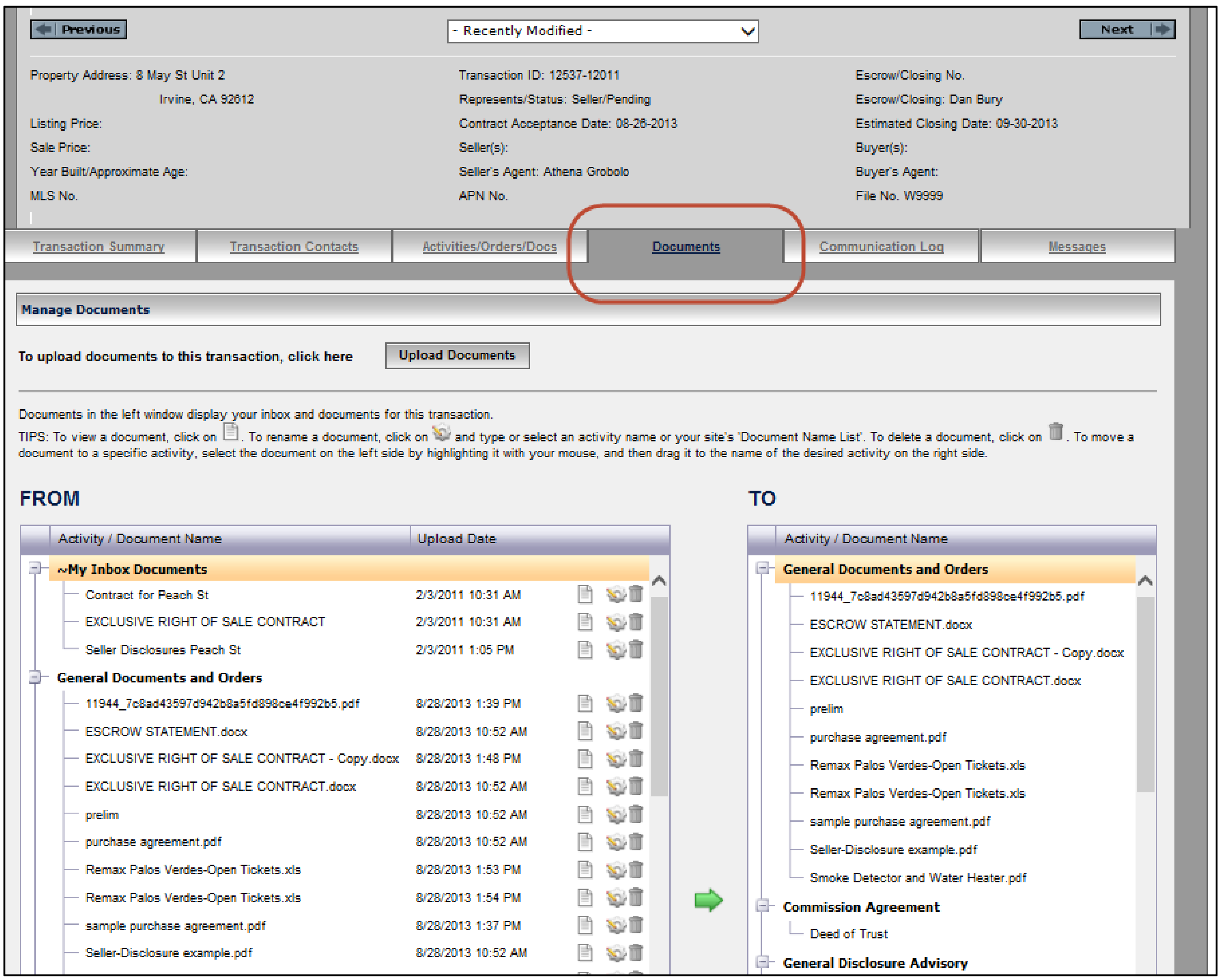
If you are using Internet Explorer 8 or 9, or 10 with compatibility turned on, or Safari, you will see the following and can upload documents individually.  When you've uploaded the desired documents, click the 'Done with Upload' button.



**NOTE:** *Documents that are emailed to the transaction's ID number will retain their link to the email thread. Documents that are dragged from an email to your computer and then uploaded as shown above will not retain their reference to the email thread. If you want the email to be tied to the document(s), email the document(s) to the transaction. The document(s) will land in General Documents and Orders and the email will land in the Communication Log.*

## *Moving Documents*

To move a document to an activity, select the document on the left side of the screen and drag it to the desired activity on the right side of the screen. It's that simple!




Note that your Inbox and the transaction's General Documents and Orders activity always appear on the top of the 'FROM' box. If your Inbox is empty, it will not display on the screen. (Remember:

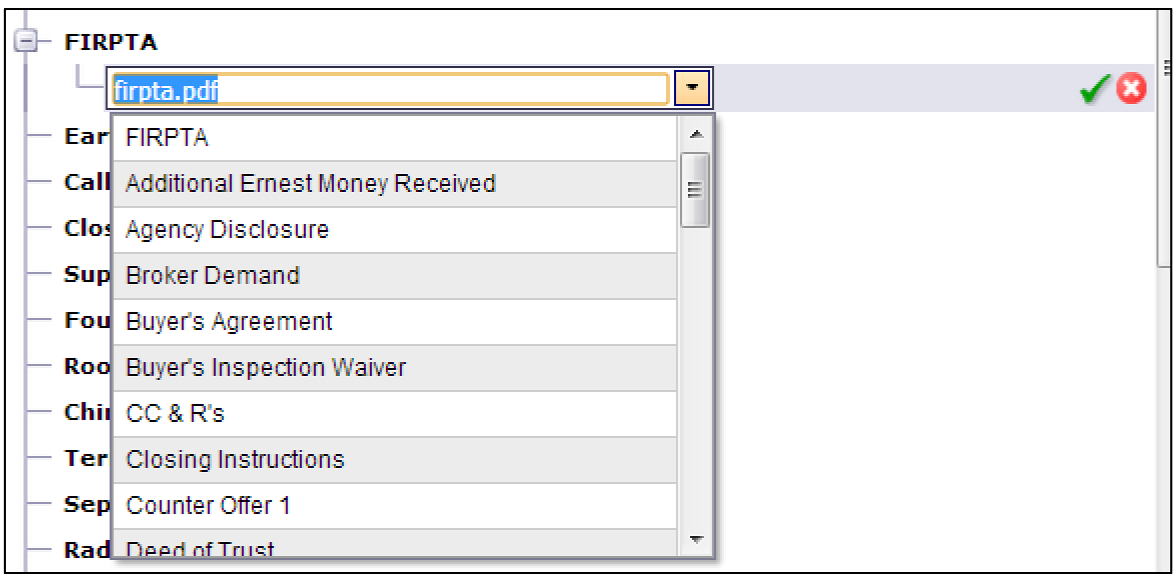
documents can be dragged to General Documents and Orders from your hard drive or by emailing them to the transaction's email address, and can be emailed to your Inbox by using your TransactionPoint User Name email address.)

## *Opening Documents*

To open a document, click on the View Document icon.

## *Renaming Documents*

To rename a document, click on the Edit icon. You will be able to rename the document by typing in a name, selecting the Activity name or choosing one of the names from your sites Document Name List. (That's the list of document names that is available to you when you use the document splitter. If your site has not set up this list, only the activity name will show. To set up the list, see 'Setting Up the Document Name List' on the next page. The Document Name list is not available forTransactionPoint Standard users.)




To save the new document name, click on the . To cancel renaming, click on the .

## *Removing Documents*

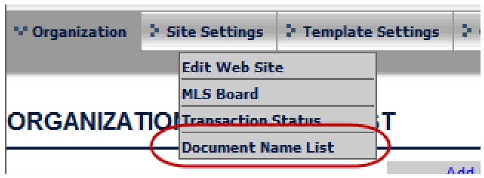
To remove a document, click on the Delete Document icon: If you don't see that icon, you don't have permission to remove documents.

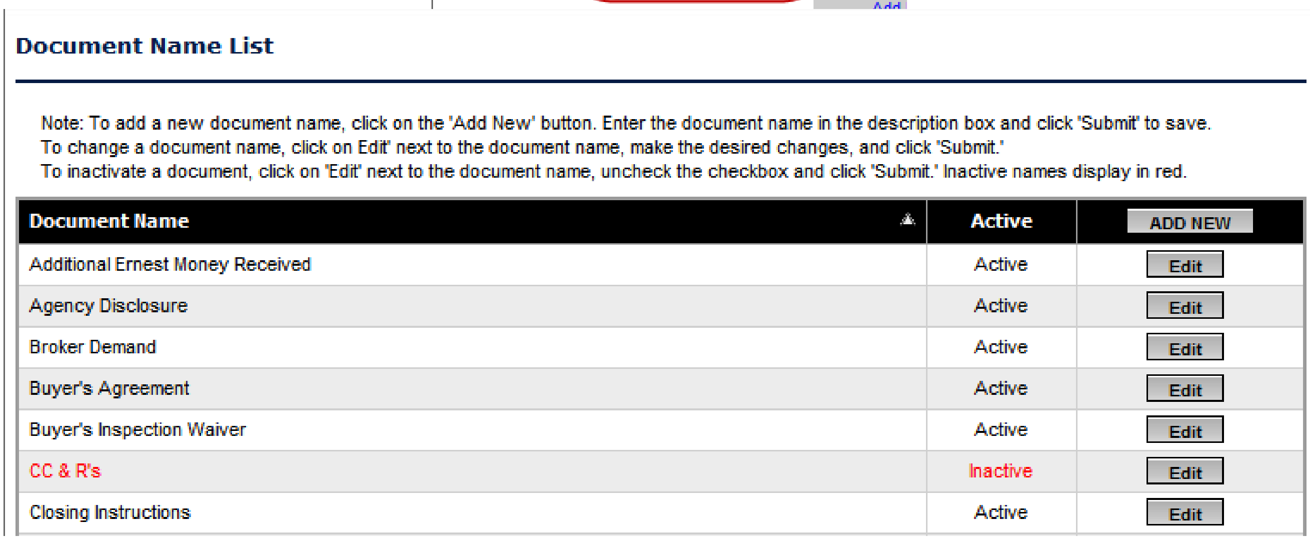
## *Drag 'n Drop on a Tablet*

Drag 'n Drop is easy to use on your tablet! If you want to scroll within the activities/documents list, you need to use two fingers instead of one and if you need to scroll the whole page, do it in the gray area outside of the activity/document list boxes.

# Setting Up the Document Name List

When a document is being split into component documents that need to be re-named, or documents are being renamed on the Documents tab, there is an option to choose a name from a pre-defined list. The list is set up by the site administrator, by selecting 'Document Name List' under the 'Site Settings' tab.



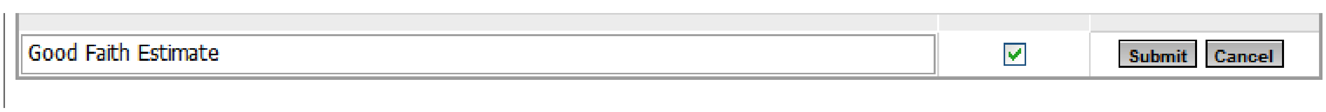



**Document Name List**

Note: To add a new document name, click on the 'Add New' button. Enter the document name in the description box and click 'Submit' to save.
To change a document name, click on Edit' next to the document name, make the desired changes, and click 'Submit.'
To inactivate a document, click on 'Edit' next to the document name, uncheck the checkbox and click 'Submit.' Inactive names display in red.

| Document Name | Active | ADD NEW |
|---|---|---|
| Additional Ernest Money Received | Active | Edit |
| Agency Disclosure | Active | Edit |
| Broker Demand | Active | Edit |
| Buyer's Agreement | Active | Edit |
| Buyer's Inspection Waiver | Active | Edit |
| CC & R's | Inactive | Edit |
| Closing Instructions | Active | Edit |

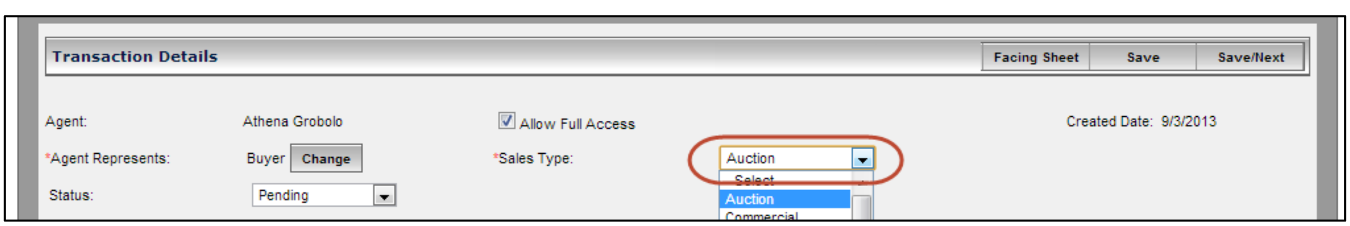
To add a document name, click on the 'Add New' button. Fill in the document name, be sure the 'active' status is as you want it (checked is active, blank is inactive,) and click 'Submit.'




NOTE: The Document Name list is not available forTransactionPoint Standard users.

# New Sales Type

A new type, Auction, is now available in the Sales Type dropdown.



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# New Communication Log Filter

When searching the Communication Log for the search type of “Transaction”, you will see a new icon that has a check mark overlaid over TXN as shown below.   That will allow you to search for the Transaction Review Status history.