



TransactionPoint®

Version 17.0 – Sept. 6, 2013

Release Notes

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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.

Transaction ID: 12537-12011

Property Address: 8 May St Unit 2
Irvine, CA 92612

Transaction ID: 12537-12011
Represents/Status: Seller/Pending
Contract Acceptance Date: 08-28-2013
Seller(s):
Seller's Agent: Athena Grobolo
APN No.

Escrow/Closing No.
Escrow/Closing: Dan Bury
Estimated Closing Date: 09-30-2013
Buyer(s):
Buyer's Agent:
File No. W9999

Transaction Summary | Transaction Contacts | Activities/Orders/Docs | **Documents** | Communication Log | Messages

Manage Documents

To upload documents to this transaction, click here [Upload Documents](#)

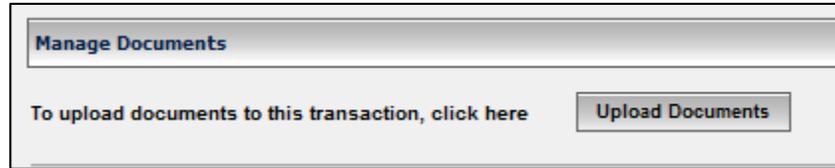
Documents in the left window display your inbox and documents for this transaction.
 TIPS: To view a document, click on . To rename a document, click on and type or select an activity name or your site's 'Document Name List'. To delete a document, click on . To move a document to a specific activity, select the document on the left side by highlighting it with your mouse, and then drag it to the name of the desired activity on the right side.

Activity / Document Name	Upload Date
~My Inbox Documents	
Contract for Peach St	2/3/2011 10:31 AM
EXCLUSIVE RIGHT OF SALE CONTRACT	2/3/2011 10:31 AM
Seller Disclosures Peach St	2/3/2011 1:05 PM
General Documents and Orders	
11944_7c8ad43597d942b8a5fd898ce4f992b5.pdf	8/28/2013 1:39 PM
ESCROW STATEMENT.docx	8/28/2013 10:52 AM
EXCLUSIVE RIGHT OF SALE CONTRACT - Copy.docx	8/28/2013 1:48 PM
EXCLUSIVE RIGHT OF SALE CONTRACT.docx	8/28/2013 10:52 AM
prelim	8/28/2013 10:52 AM
purchase agreement.pdf	8/28/2013 10:52 AM
Remax Palos Verdes-Open Tickets.xls	8/28/2013 1:53 PM
Remax Palos Verdes-Open Tickets.xls	8/28/2013 1:54 PM
sample purchase agreement.pdf	8/28/2013 1:37 PM
Seller-Disclosure example.pdf	8/28/2013 10:52 AM

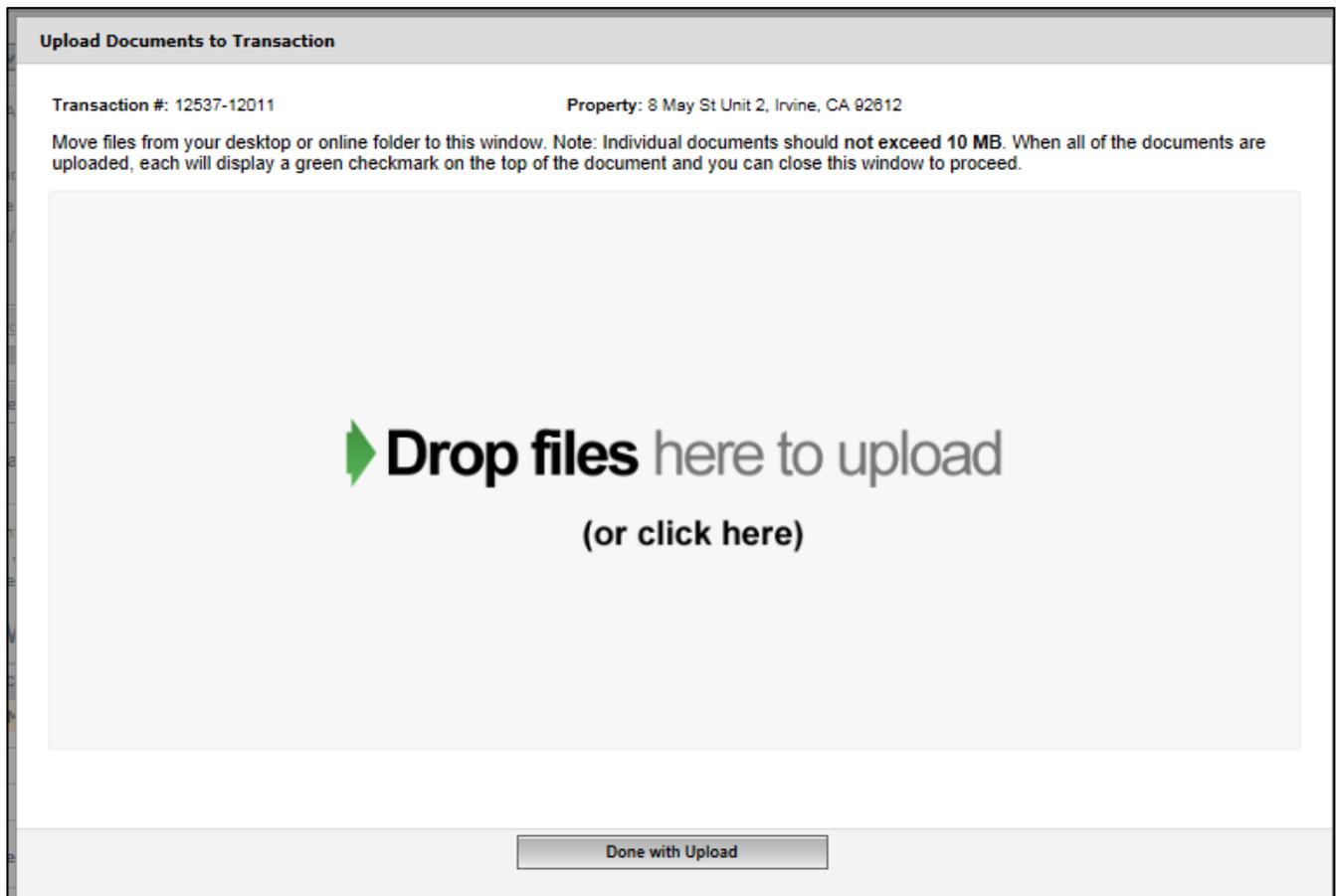
Activity / Document Name
General Documents and Orders
11944_7c8ad43597d942b8a5fd898ce4f992b5.pdf
ESCROW STATEMENT.docx
EXCLUSIVE RIGHT OF SALE CONTRACT - Copy.docx
EXCLUSIVE RIGHT OF SALE CONTRACT.docx
prelim
purchase agreement.pdf
Remax Palos Verdes-Open Tickets.xls
Remax Palos Verdes-Open Tickets.xls
sample purchase agreement.pdf
Seller-Disclosure example.pdf
Smoke Detector and Water Heater.pdf
Commission Agreement
Deed of Trust
General Disclosure Advisory

Adding Documents to a Transaction

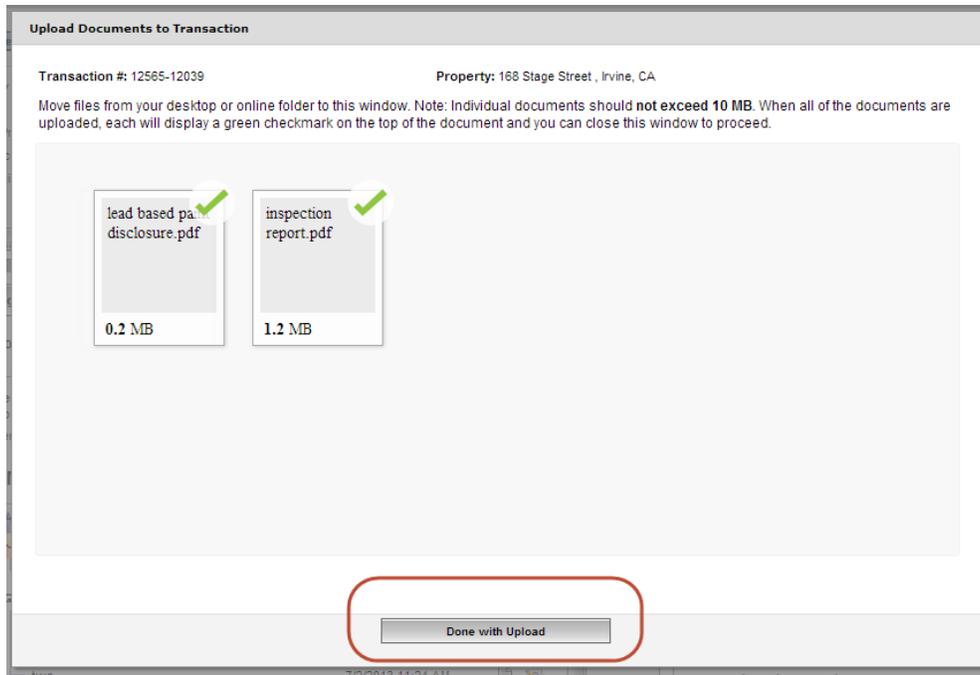
To add documents from your hard drive or desktop to the transaction's 'General Documents and Order's activity, click on the 'Upload Documents' button.



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.

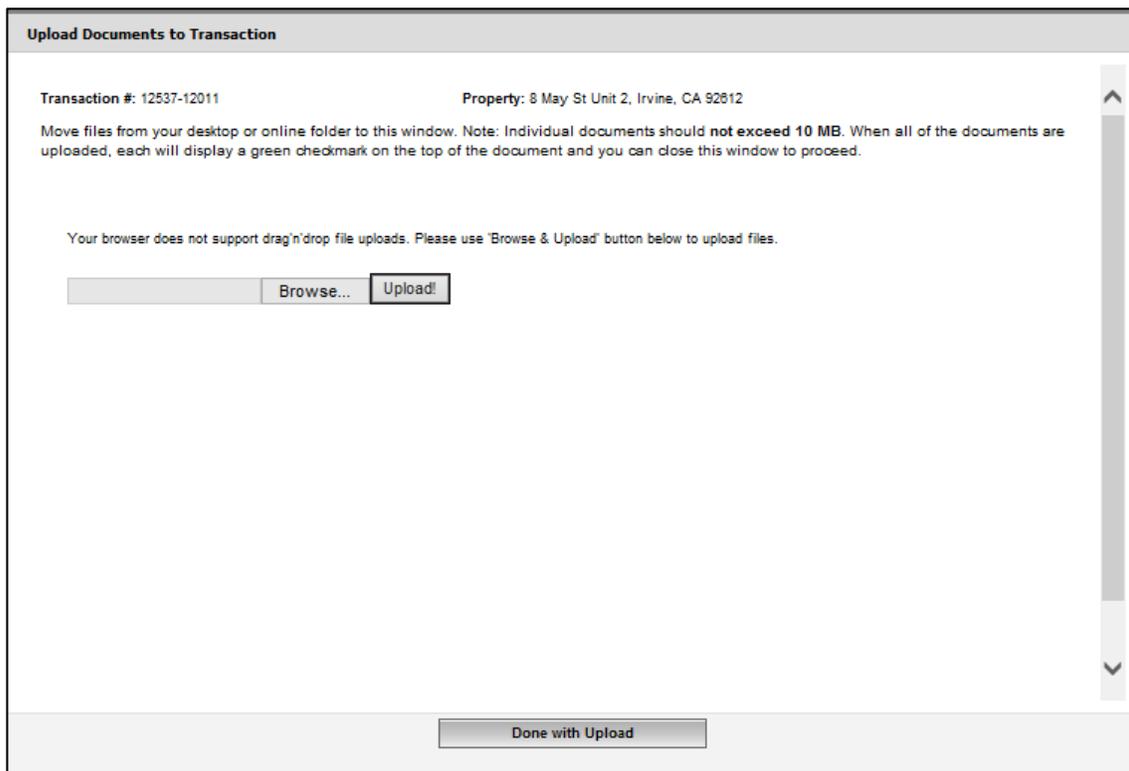


When the documents you've dragged to the window are done, a green check will appear on the top of each document to indicate that the upload is complete.



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!

The screenshot displays the TransactionPoint interface for a specific transaction. At the top, there are navigation buttons for 'Previous' and 'Next', and a dropdown menu set to '- Recently Modified -'. Below this is a summary section with three columns of information: Property Address (8 May St Unit 2, Irvine, CA 92612), Transaction ID (12537-12011), and Escrow/Closing No. (Dan Bury). Other details include Listing Price, Sale Price, Year Built/Approximate Age, MLS No., Contract Acceptance Date (08-28-2013), Seller(s), Seller's Agent (Athena Grobolo), Buyer(s), Buyer's Agent, and File No. (W9999).

Below the summary is a horizontal menu with tabs: Transaction Summary, Transaction Contacts, Activities/Orders/Docs, **Documents** (highlighted with a red circle), Communication Log, and Messages.

The main area is titled 'Manage Documents' and includes an 'Upload Documents' button. Below this, there is a section for 'Documents in the left window display your inbox and documents for this transaction.' with a 'TIPS' section explaining how to view, rename, delete, and move documents.

The interface is divided into two main sections: 'FROM' and 'TO'. The 'FROM' section contains two lists of documents:

- ~My Inbox Documents:**
 - Contract for Peach St (2/3/2011 10:31 AM)
 - EXCLUSIVE RIGHT OF SALE CONTRACT (2/3/2011 10:31 AM)
 - Seller Disclosures Peach St (2/3/2011 1:05 PM)
- General Documents and Orders:**
 - 11944_7c8ad43597d942b8a5fd898oe4f992b5.pdf (8/28/2013 1:39 PM)
 - ESCROW STATEMENT.docx (8/28/2013 10:52 AM)
 - EXCLUSIVE RIGHT OF SALE CONTRACT - Copy.docx (8/28/2013 1:48 PM)
 - EXCLUSIVE RIGHT OF SALE CONTRACT.docx (8/28/2013 10:52 AM)
 - prelim (8/28/2013 10:52 AM)
 - purchase agreement.pdf (8/28/2013 10:52 AM)
 - Remax Palos Verdes-Open Tickets.xls (8/28/2013 1:53 PM)
 - Remax Palos Verdes-Open Tickets.xls (8/28/2013 1:54 PM)
 - sample purchase agreement.pdf (8/28/2013 1:37 PM)
 - Seller-Disclosure example.pdf (8/28/2013 10:52 AM)

The 'TO' section contains a list of documents under the heading 'General Documents and Orders':

- 11944_7c8ad43597d942b8a5fd898oe4f992b5.pdf
- ESCROW STATEMENT.docx
- EXCLUSIVE RIGHT OF SALE CONTRACT - Copy.docx
- EXCLUSIVE RIGHT OF SALE CONTRACT.docx
- prelim
- purchase agreement.pdf
- Remax Palos Verdes-Open Tickets.xls
- Remax Palos Verdes-Open Tickets.xls
- sample purchase agreement.pdf
- Seller-Disclosure example.pdf
- Smoke Detector and Water Heater.pdf

Below the 'TO' list, there are two additional sections: 'Commission Agreement' (with a sub-item 'Deed of Trust') and 'General Disclosure Advisory'.

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:

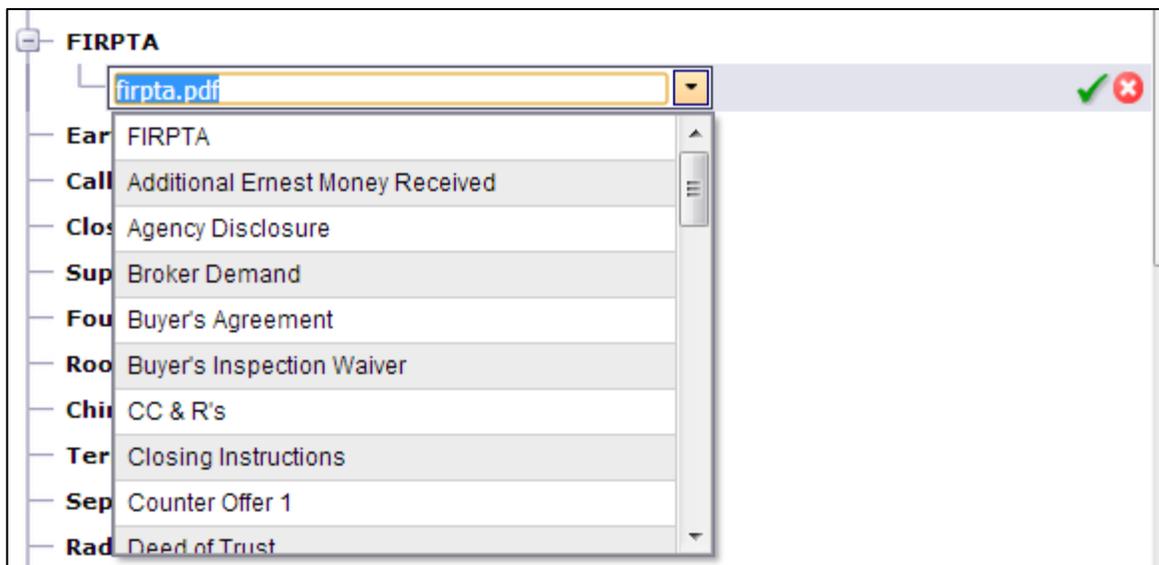
documents can be dragged to General Documents and Orders from your hard drive or by emailing them to the transaction's email address, and can be emailed to your Inbox by using your TransactionPoint User Name email address.)

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 for TransactionPoint Standard users.)



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

Removing Documents

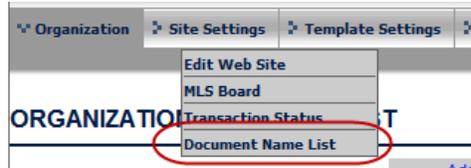
To remove a document, click on the Delete Document icon:  If you don't see that icon, you don't have permission to remove documents.

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 Earnest Money Received	Active	<input type="button" value="Edit"/>
Agency Disclosure	Active	<input type="button" value="Edit"/>
Broker Demand	Active	<input type="button" value="Edit"/>
Buyer's Agreement	Active	<input type="button" value="Edit"/>
Buyer's Inspection Waiver	Active	<input type="button" value="Edit"/>
CC & R's	Inactive	<input type="button" value="Edit"/>
Closing Instructions	Active	<input type="button" value="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.'

Good Faith Estimate

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

New Sales Type

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

Transaction Details

Agent: Athena Grobolo Allow Full Access Created Date: 9/3/2013

*Agent Represents: Buyer *Sales Type: Auction

Status: Pending

Auction
Select
Auction
Commercial

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.

Communication Log

To:

Comments:

Search Criteria:

Type:

Keywords:

Date Range: Between and

Created By:

Full Message

Type	Date Time	Who	To
 TXN	9/4/2013 7:57:14 PM (PDT)	TestingDemo Super User	Transaction#: 3840-3875
Transaction review status has been changed from Ready for Review to Review Completed.			
 TXN	9/4/2013 7:56:47 PM (PDT)	Demonstrations TC1	Transaction#: 3840-3875
Transaction has been submitted for "Ready for Review". Sent to: ;			
TXN	3/20/2013 11:27:36 AM (PDT)	Demonstrations TC1	Transaction#: 3840-3875
This transaction is created by Demonstrations TC1			