

TransactionDesk Basic Training

Part 1:

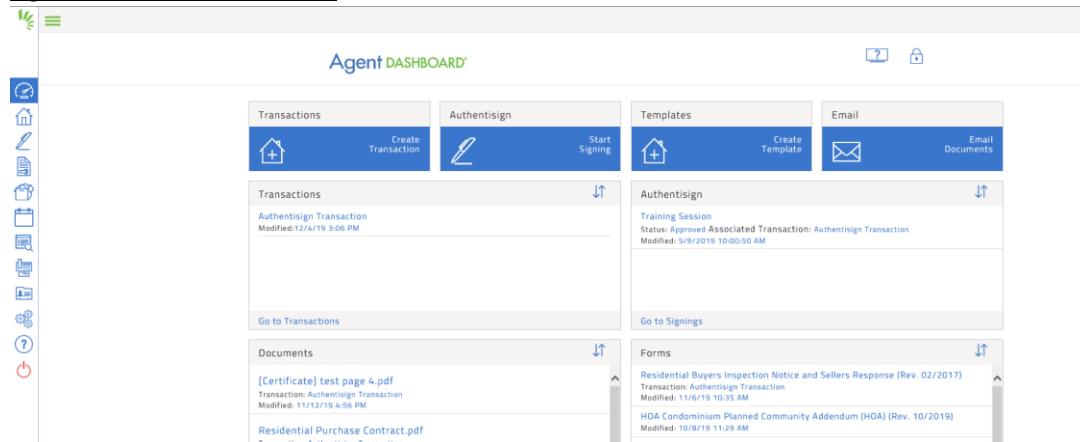
Where to Login

AAR Single Sign-On: dashboard.azrealtorsso.com

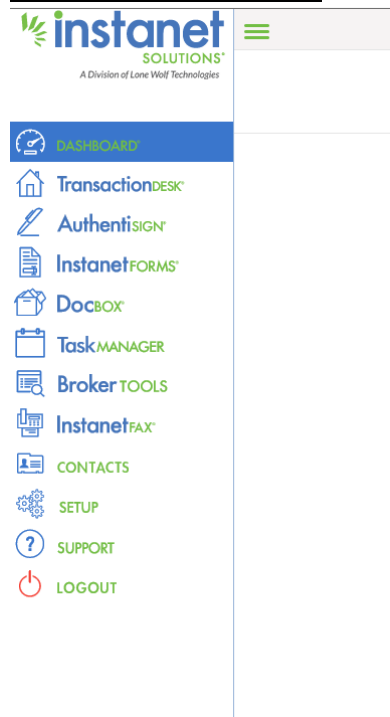
AARForms.com

Part 2:

Agent Dashboard Overview



Service Window Overview



Part 3:

Support

Support

Contact us by phone: 800-668-8768.

Lone Wolf Technologies Support is available 24 hours a day, seven days a week. We recommend this, during business hours for the fastest response and resolution times.

Contact us by email: tdsupport@lwolf.com

 - Live support

 - Online Training

 - Send Feedback

 - Guides

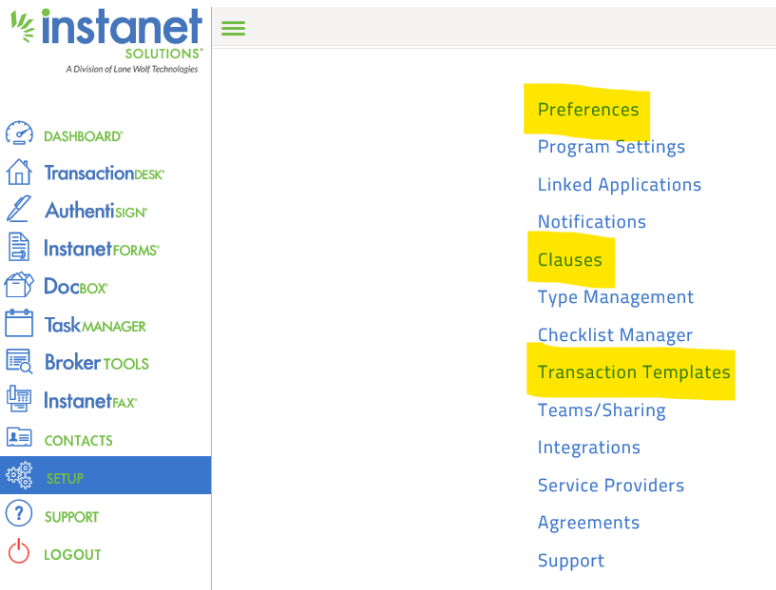
 - Help Videos

 - Pre-Recorded Webinar Videos

Part 4:

Setup

- Preferences
- Create a Clause
- Create a Transaction Template



The screenshot displays the Instanet SOLUTIONS user interface. The top left corner features the Instanet SOLUTIONS logo, with the tagline "A Division of Lone Wolf Technologies". A hamburger menu icon is located to the right of the logo. The main navigation menu on the left includes the following items: DASHBOARD, TransactionDESK, AuthentisIGN, InstanetFORMS, DocBOX, TaskMANAGER, BrokerTOOLS, InstanetFAX, CONTACTS, SETUP (highlighted in blue), SUPPORT, and LOGOUT. The right-hand side of the interface shows a list of menu items under the "Setup" section, with "Preferences" and "Transaction Templates" highlighted in yellow. The list of items includes: Preferences, Program Settings, Linked Applications, Notifications, Clauses, Type Management, Checklist Manager, Transaction Templates, Teams/Sharing, Integrations, Service Providers, Agreements, and Support.

Part 5:Create a Transaction

- Apply a Transaction Template
- Import property information from MLS by using Import Data
- Walkthrough the 5 step Wizard process
- How to fill out a form
- Overview of forms editor toolbar

Part 6:Create an Authentisign Signing Session

- Step 1 – Details & Advanced Options
- Step 2 –Add Participants/signers
- Step 3 – Add documents and forms to the signing session
- Step 4 – Design: Add Signature locations to forms
- Step 5 – Send the signing invitation(s)
- Step 6 – Sign the documents