

TRANSACTION DESK

INSTANET

- Repository for all transaction information
 - All paperwork
 - Photos
 - Contacts
 - Replaces the folder on your computer
-

AUTHENTISIGN

- Digital signings
 - Signature
 - Initials
 - *Client* data entry
-

SUCCESSFUL SIGNING

- Details – anything to add, edit or delete. Don't forget dates
 - Contacts – Name, role, email
 - Paperwork – ensure all data entry is done
 - Create a signing session
-

INSTANET TIPS

- Use the transaction's email address to easily forward paperwork directly to your folder
 - Click the painter's palette at the top of a document to added text
 - Click the slicer tool to pull apart/rearrange/delete pages
 - Fax cover sheet can be used to fax paperwork directly to a folder
 - Create templates to save time when creating a transaction
 - Change the default font color of fillable form fields for easier reading
 - Download the mobile app to easily access, and upload to, your transactions
-

AUTHENTISIGN TIPS

- Take advantage of *Initial Pages* to add initials to multiple document pages at once
- Select a control (selected when garbage can is visible) to access its options
- Always customize at least the subject line of signing emails
- Be sure to de-select a control before moving to another signer

[illegible]