



The Complete Transaction Management Solution

Take your business paperless and manage all your listings, sales and leases online.

BROKERAGE ACCOUNTS INCLUDE POWERFUL MANAGEMENT TOOLS

REPORTING AND FILE MANAGEMENT

View and access all the listing, sale and lease files in your office.

FILE REVIEW COMPLIANCE MANAGEMENT

Define what documents you require for each transaction type. Brokerage staff can quickly and easily review files online, from any computer with web access.

SAVE MONEY, GO PAPERLESS

Save on printing consumables, storage, staff time, telecommunications cost, etc.

BROKERAGE BRANDING

All emails, faxes and the Customer Service Portal are branded

Includes DocBox

Access and manage your documents from any computer with an internet connection. No need to carry your paper files everywhere you go!

Includes InstanetFax

Includes unlimited inbound and outbound faxing, including InstanetFax™, our paper fax to email technology.

Includes DocBox2Go

Access all your files from your Smartphone.

Includes Instanet Forms

Create and distribute online forms and contracts.

Task Management

A virtual checklist lets you manage all your transaction related tasks and to-dos.

Calendar and Appointment Management

View appointments and events in a calendar format. Users have the ability to share calendars with other TransactionDesk users in the same office.

Customer Service Portal

Give your clients 24/7 online access to their transaction documents and other information you wish to share. Improve your customer service while saving time

Optional Authentisign E-Signature Tool

Contracts and forms can be e-signed using the optional, fully integrated Authentisign module.

TransactionDesk can be purchased as an individual package or as part of our complete suite of products.



Online Forms

Document Management

Internet Faxing

Transaction Management

SmartPhone Access

Digital ESignings

All services are available individually or together as

ONE PROGRAM, ONE INTERFACE AT ONE LOW PRICE



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Only TransactionDesk Gives You All These Features in One Easy Platform.

Feature	Description	Compare	Compare
Online forms and Contracts	Includes InstanetForms, a full featured online forms application.		
Quick Start Groups/Form Packets	Define forms that are automatically added to listing, sale and lease files.		
Document Management	Includes DocBox, the industry leading document management application.		
Tasks and Activity Plans	Manage all activities of your transactions and your business using the online checklists.		
Appointment and Calendar	Track all your appointments for your transactions and other business.		
Automated Reminders	Automated email reminders for both tasks and appointments ensures you won't miss a thing.		
Customer Service Portal	Securely share documents and other information with clients 24/7/365. The customer service portal is agent and brokerage branded.		
Contact Database/Address Book	Built in contact database. Contacts can be imported from Outlook and Top Producer.		
Service Ordering	Save time by automatically collecting file information such as vendor contact info, property address, buyer/seller names, etc.		
Templates	Save time and effort. Set-up the system once and let the system do the work for you. Templates for forms, documents, checklists and transactions.		
Mobile Access	Includes DocBox2Go, access all your transaction files from your Smartphone.		
Internet Faxing - Toll Free Inbound/Outbound and Fax log	Includes InstanetFax. No charge for sending or receiving faxes within the Continental U.S. and Canada.		
Unlimited Storage	No limit on document storage. Store all your document files, not just listing sale and lease files.		
Offline and Online File Archiving	We keep all your files for the legal retention period in your state. And, you can keep an offline copy as well.		
Includes Pro and Lite Views	Each subscription includes both versions of TransactionDesk. Lite, if you want to keep it basic. Pro, for access to all the powerful features.		
Branded	All communications and anything a client or third party can see is branded - emails, faxes, etc.		
Customizable Settings	Configure the system to work the way you like to work.		
Easy Step by Step Wizards	The system guides you through step by step to make your work easier.		
Audit Trails and Logging	Tracks all activities and creates an audit trail in each transaction file automatically - "The Paperless Paper Trail".		
Works for Teams and Partnerships	Easily share and work on files together.		
Authentisign Digital Signatures	Optional e-signature module is fully integrated making TransactionDesk the most complete paperless transaction platform in the industry.		
Brokerage Features			
File Review and Compliance Manager	Easily perform file review online, from any computer with an internet connection. Reduce legal exposure, easily making sure all files are complete.		
Reporting	Easily find documents and other information for any transaction file in your office or company.		
System Configuration and Set-up	Flexible system works the way you work. Brokerage staff can define templates and branding that applies to all agents in the office and/or company.		
Brokerage Branding	Ensures your company's value is recognized by your agents and clients.		

Sign up for FREE training at www.InstanetSolutions.com/transactiondesk/webinars



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