TransactionDESK®

App

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Navigating the App

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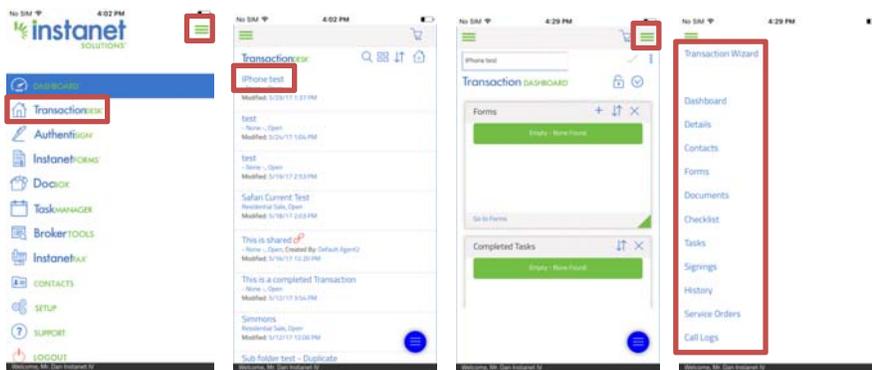SOLUTIONS

Navigating the App

Below is a basic overview of how to navigate around in the TD app. When you first login to the App you will start on the "Agent Dashboard". Throughout the site you will notice different button icons on the site. Below is an overview of what each typically do. To start we will look at the "Green Hamburger" button in the top left hand corner. (It looks like three green horizontal lines.) As shown in screenshot 1 below.

- ■ When tapped this will expand the left hand menu and allow you to jump to different sections of the site. As you can see in Screenshot 1 and 2.

You will see these "Hamburger Buttons" in either the top left hand corner or top right hand corner of the different sections you navigate too. You can think of these buttons as your way to get places. For example in the four screenshots below.
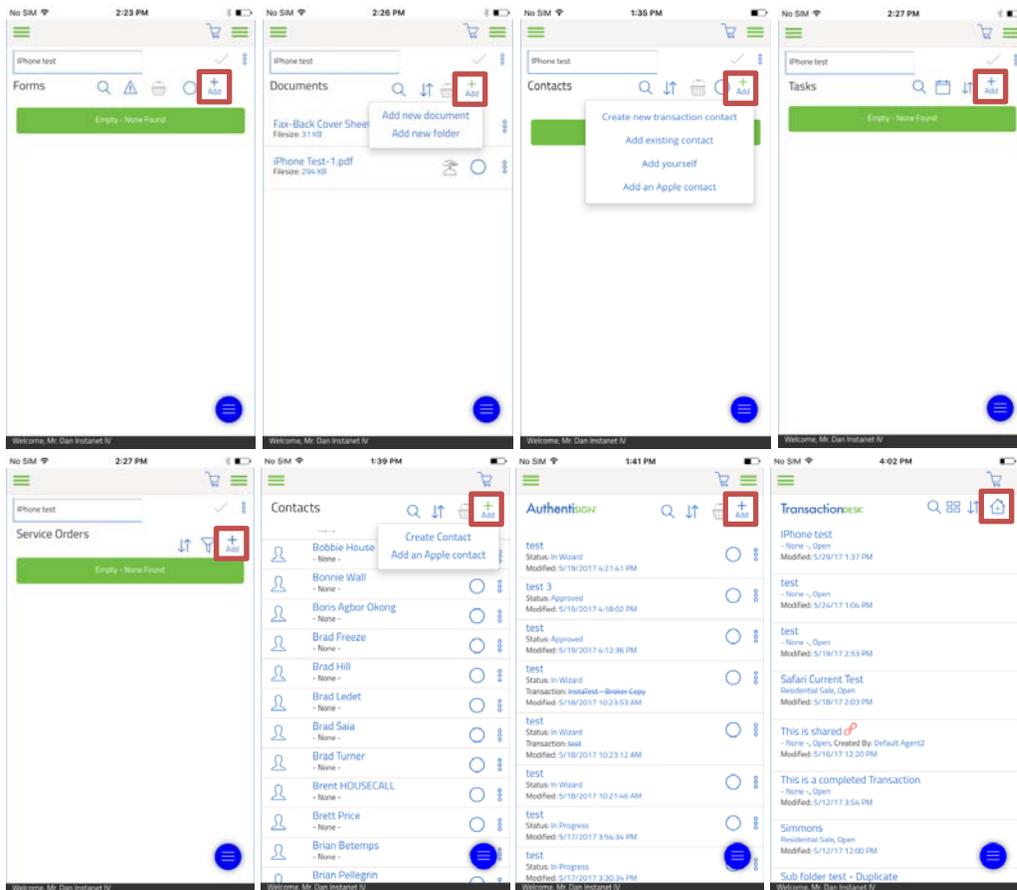
- ■ I tapped the hamburger in the top left hand corner to expand the menu.
- ■ I now tapped the TranasctionDesk option to go to my transaction page.
- ■ Now I tapped the name of one of my transactions to open it and land on the Transaction Dashboard screen. (As you may notice there is now another hamburger button but on the right hand side of the screen.)
- ■ This time when I tap the hamburger button in the right hand corner, it expands a right hand menu of the different sections I can navigate to in the transaction itself. From here I can jump to the forms section, documents section and so on to see manage my transaction file.

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Now that you know how to get places in the App you will now need to know how to add different items. There are really two buttons you will see throughout the site that will allow you to add an item.

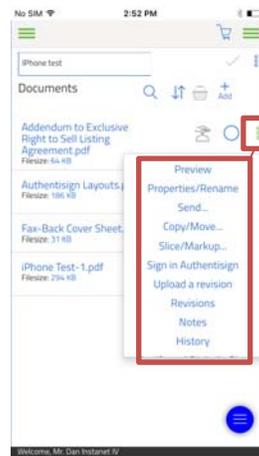The most common add button you will see will be a plus icon with the word "add" below it.

- This will allow you to create either a new file, new form, new document, new contact etc.
- Some examples below is where you will find the add icon and the sub menus you will see when tapping it.
- The only exception where you can add something that is not a plus icon like above is on the transaction page. It will actually be a house with a plus icon.
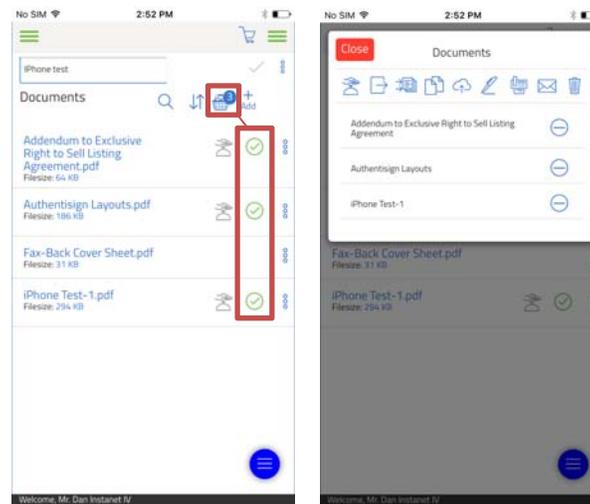 Although it does the same thing as the other Add buttons. (See last screenshot)

(Keep scrolling down for more button icon descriptions)

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Now that we have covered how to add an item we will look into how to perform actions on them. The two action buttons you need to be aware of are below. This is different from the add button as you already have to have an item created. There are two types of action buttons

- The ellipses menu is the first one. It looks like three horizontal dots ⁝ and you will see them beside an item that is already created in the platform. See screenshot below. I am in the documents section of a transaction. If I hit the ellipses menu next to a document item it gives me a menu of all the different actions I can take on this item.
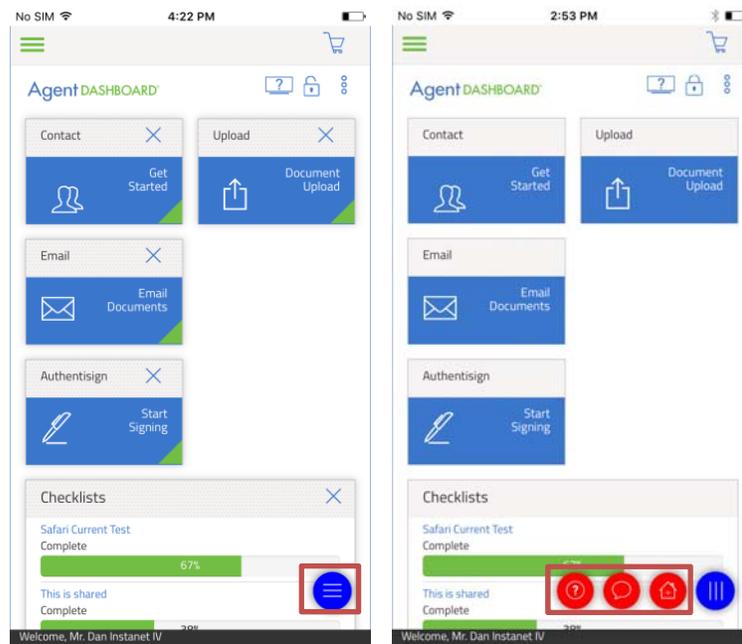

- The second is the basket icon. 🧺 This allows you to perform an action on multiple items that are selected. When you select multiple items you will see a counter that shows on the basket to display how many items have been selected. Tap the basket icon to bring up a menu of all the actions you can perform on all the items selected. The top will show the action and the bottom will show the items selected in the second screenshot.

(Keep scrolling down for last button icon description)

The last icon to be aware of is the blue orb icon in the bottom right hand corner of your screen. You will see it there on most screens. This is a shortcut button to three different sections. Tap the button to expand the menu options.

- The first one is to the support section where you can watch videos and guides on how to use the site.
- The second that looks like a speech bubble is the feedback section. This allows you to send in feedback about the site. We are always looking to hear your opinions so don't be afraid to use this button.
- The last one is a shortcut to create a transaction so you can create a transaction quickly when you need too.

That is it! You know know how to navigate the site and are ready to get more advanced in what you do.