

# TransactionDESK®

App

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## How to Add Your Mobile Contacts in TransactionDesk

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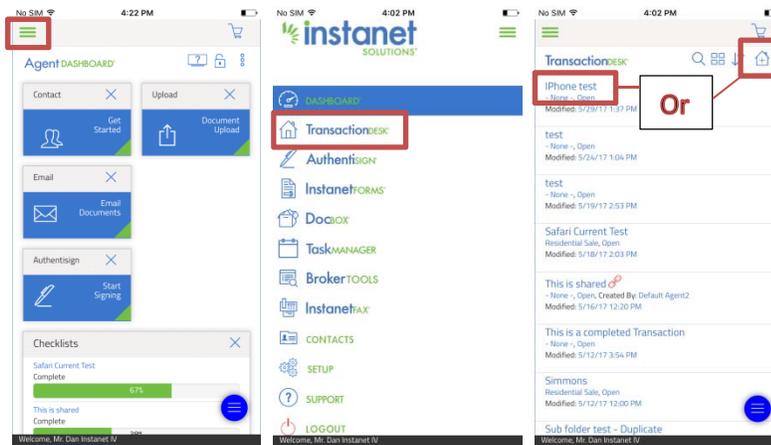


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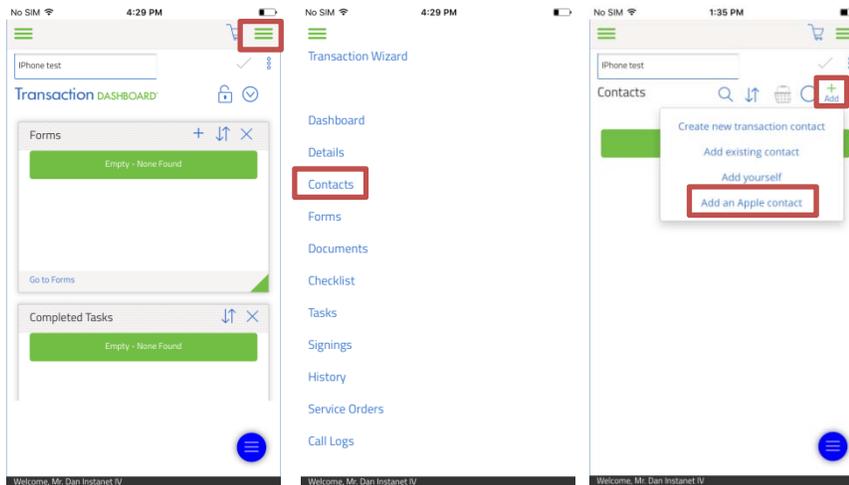
You can now add your mobile contacts directly into TransactionDesk when working with the software. There are three places you can import a mobile contact into. You can import one into your Transaction contacts, your Address book contact section and you can import a contact into one of your Authentisign signings.

Starting with your **Transaction contacts** the screenshots below will show you the steps.

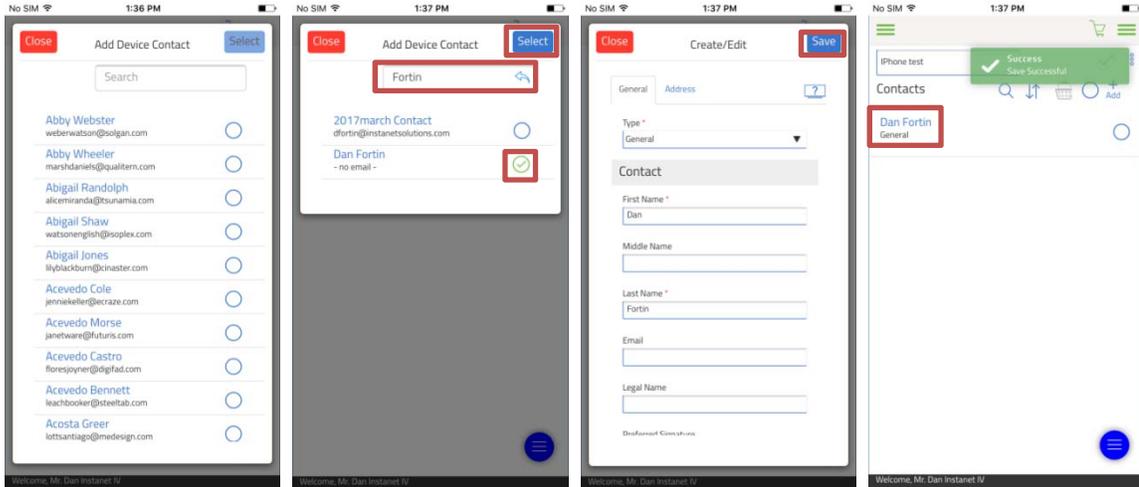
- First hit the hamburger button in the top right hand corner of your screen to expand the left hand menu. Next click TransactionDesk to navigate to your transaction page. Now either open an existing Transaction by tapping the name or create a new one by hitting the house icon in the right hand corner as seen in screenshot 3.



- Once the transaction is open, tap the green hamburger in the top right hand corner and then tap contacts. Once you are re-directed to the contacts section hit the plus icon to add a new contact and tap “add an Apple contact”.

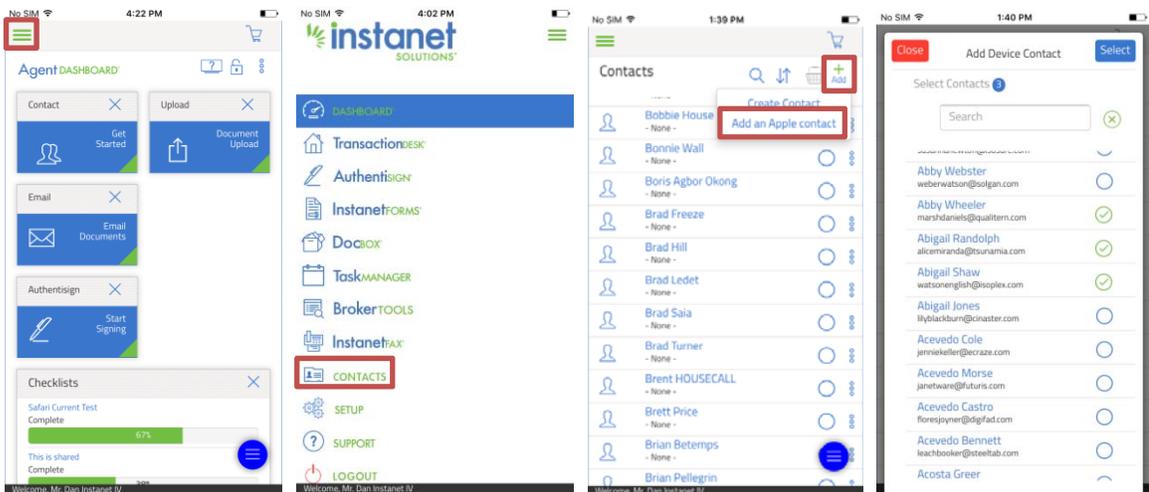


Once you hit the “Add an Apple contact” you will be prompted with a new pop up window to select your mobile contact. You can either just check off one of the contacts on the list, or use the search bar to narrow your results down. Once you have the contact you would like to add just check them off and hit select. Now you just have to hit save on the contact creation screen. (You can only add one contact at a time while in a Transaction as you need to choose a role for them before being able to create them)



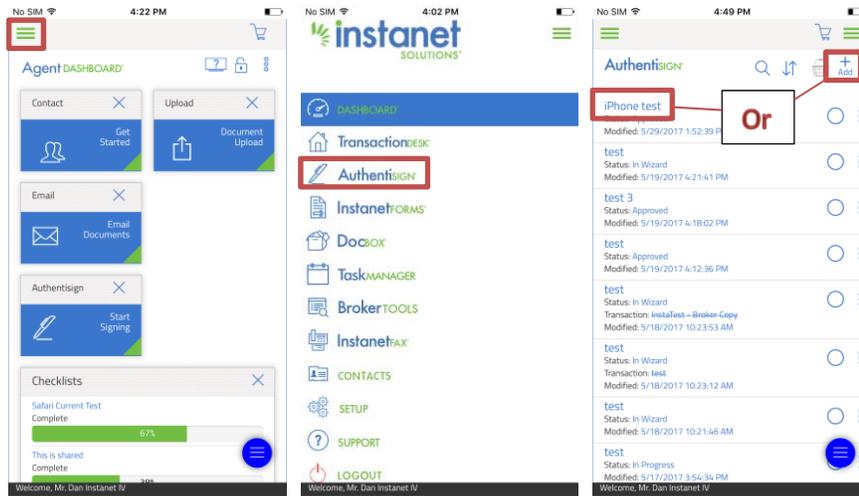
Second area to add your contacts is in the **Contact** section of TransactionDesk.

- To start, click the green hamburger button in the top left hand corner to expand the menu and click contacts.
- Once you are in your Contacts section you can then hit the add button and add multiple contacts to your address book. Now you can add these contacts anywhere in the site that permits you too. You can add multiple contacts here as well you are not limited to one.

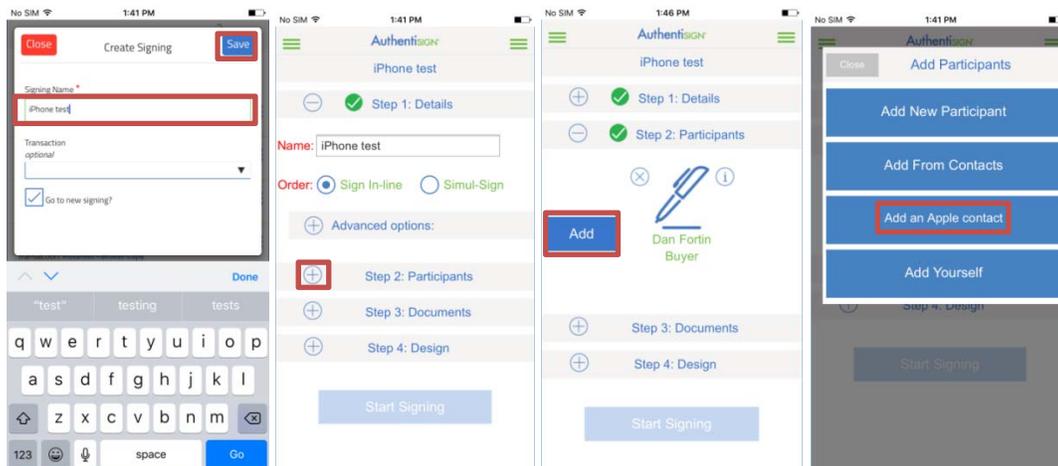


Third area to add a contact is when you are creating a signing transaction and you are prompted to add a contact in step 2 of the **Authentisign Contact** section.

- To get started click the hamburger button in the top left hand corner to expand the menu. Next click Authentisign in the list.
- Now go ahead and either create a new signing or open an existing one by clicking the name of the signing as seen in the last screenshot.



- If you hit create new signing you will be prompted with the first screen. Go ahead and name the signing and hit “Save” to create it, which will bring you into step 1. If you just tapped the name and the signing is in the “Wizard” status, it will just automatically start you in step 1.
- To get to step 2, just tap the plus icon next to step 2 to expand that section. Now tap “add” and choose “add an Apple contact”.



- Once you hit “add an Apple contact” you will be prompted with your mobile contact list once again. Go ahead and pick someone on the list or use the search bar to narrow your results down. Once you find the contact you want, click the name to add it to your signing.
- That is it, now you have successfully added that contact to your signing and they will now get a signing invite once you have finished sending the signing out.

