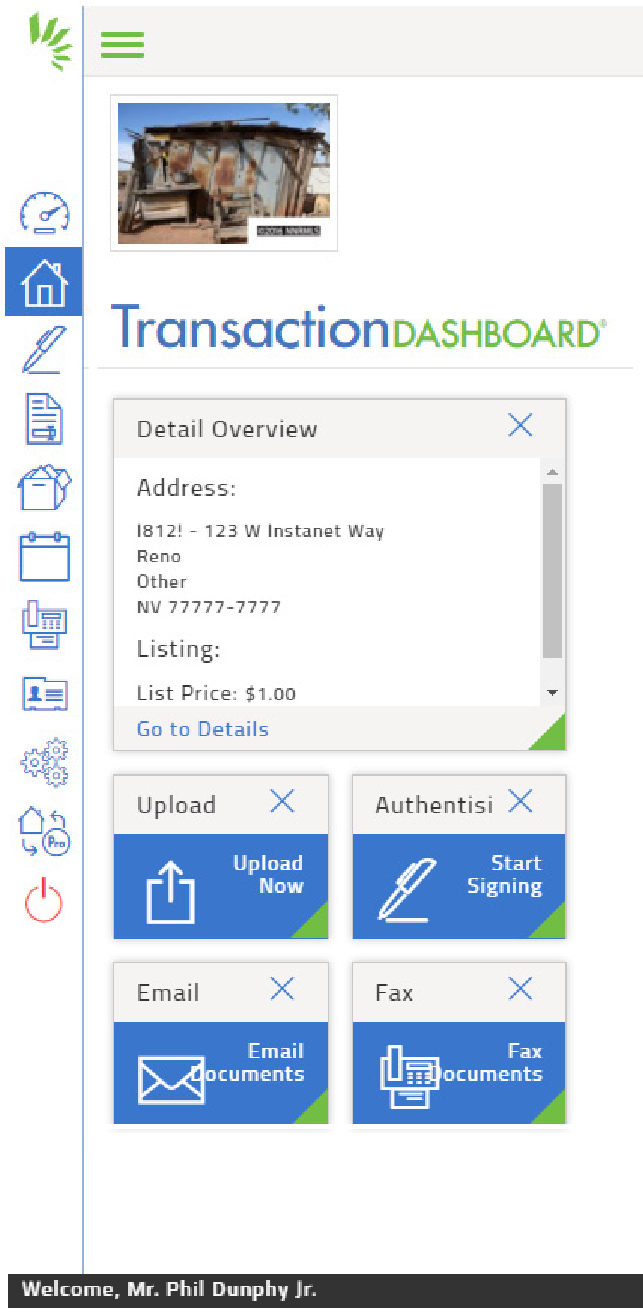
instanet SOLUTIONS | Transaction TOOLS | User Guide

(For the Agent Dashboard User Guide, [Click Here])



Burger Menu: Reveals Transaction Tools → Transaction Wizard

Customizable Transaction Dashboard: All the most important aspects of your transaction will show here → Dashboard

Property Detail: A "coversheet" that contains the important property & transaction characteristics such as address, list price, offer amount and transaction dates → Property Detail

Contacts: Find and add transaction contacts for the listing and selling sides: Buyers, sellers, others → Contacts

Forms: All forms for this specific transaction; already auto-filled with info from the Property Detail and Contacts → Forms

Documents: Your document storage file – all documents for this specific transaction → Documents

Checklist (Optional "paperless office" feature): Allows you and/or your Broker to add transaction checklists made up of documents and tasks → Checklist

Tasks (Optional feature): Allows you and/or your Broker to add one or more transaction email reminders → Tasks

Signings: All the electronic signings for this specific transaction → Signings

History: Complete history of the transaction; when it was created, when forms and contacts were added and much more → History

Service Orders: Create service orders for appraisal, financial, title and escrow vendors → Service Orders

Call Logs: Create records of conversations you've had about the transaction → Call Logs

The Wizard is a tool that guides you through the 5 important steps of creating a transaction