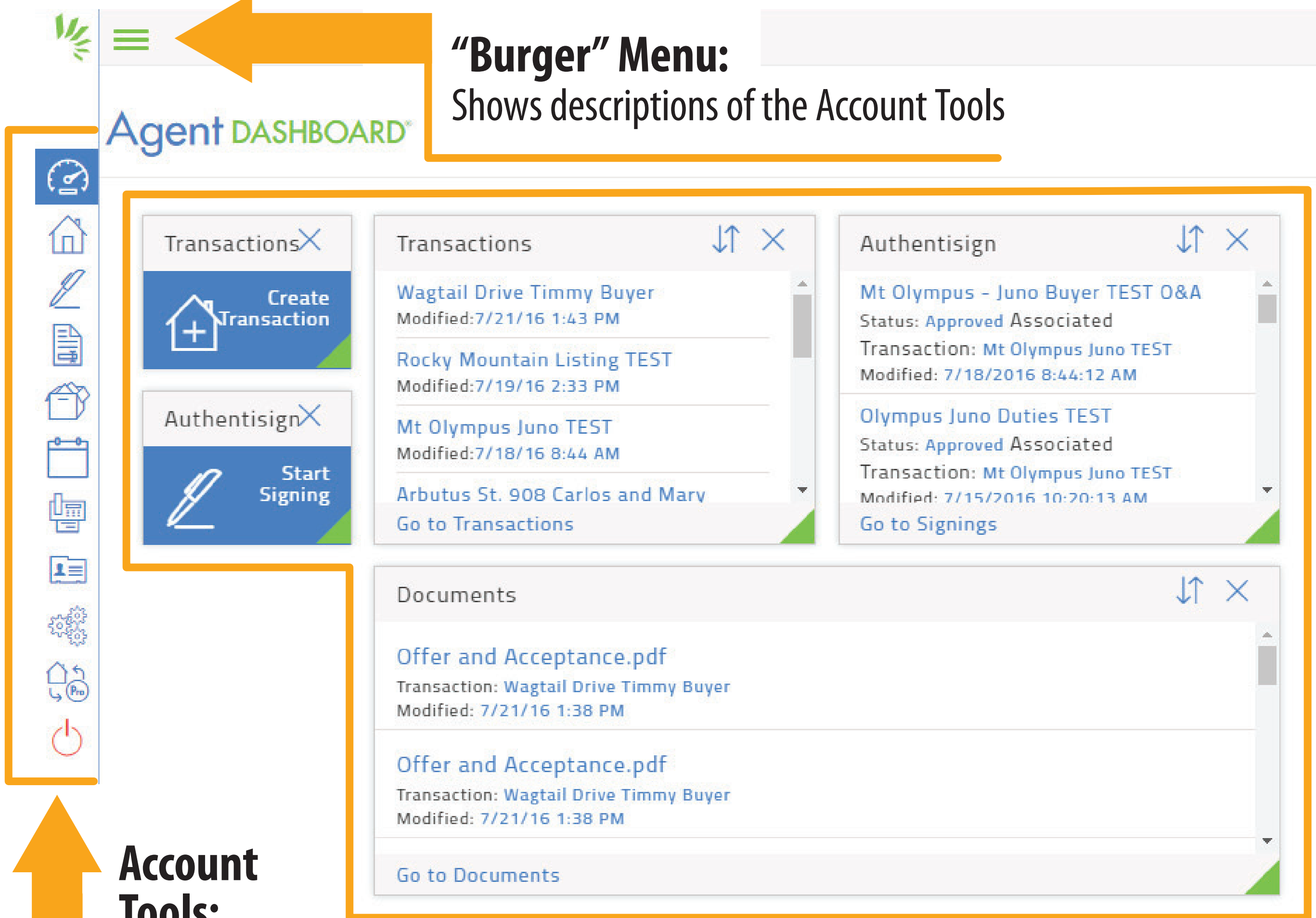
instanet SOLUTIONS | Agent DASHBOARD | User Guide

How-To Video:
Customize your Dashboard

"Stoplight Menu":
Reveals widgets that can be added to your Dashboard

"Burger" Menu:
Shows descriptions of the Account Tools



Padlock Tool:
Unlocks Dashboard for customization

Dashboard Widgets:
Can be resized by dragging green triangle, moved by clicking on the widget title and dragging to a different spot, removed by clicking the "x" and if available, the opposing arrows can be used to sort the widget contents

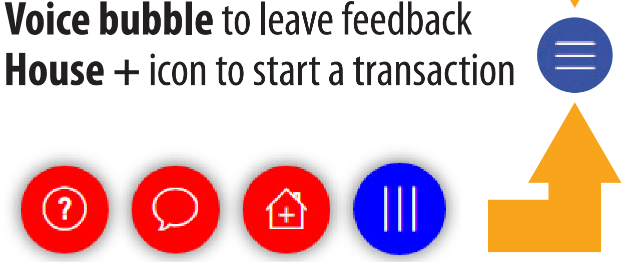
Account Tools:
Click icons to see different parts of your Instanet account
Click to view the ***Agent Tools User Guide***

Account Owner's Name

Welcome, Mr. Phil Dunphy Jr.

"Blue Burger" Rolling Menu:

Click to see **3** tools:
1. Question mark for help
2. Voice bubble to leave feedback
3. House + icon to start a transaction



instanet SOLUTIONS | Account TOOLS | User Guide

(For the Agent Dashboard User Guide, Click Here)

Agent DASHBOARD®

- DASHBOARD® — **Speedometer Icon:** Your agent Dashboard
- TransactionDESK® — **House Icon:** Your transactions
- AuthentiSIGN® — **Pen Icon:** Your digital signings
- InstanetFORMS® — **Paper Icon:** Your form library
- DocBOX® — **Box Icon:** Your unlimited document storage and transaction docs
- TaskMANAGER — **Calendar Icon:** Calendar reminders for all transactions
- BrokerTOOLS — **Legal Pad Icon (Brokers Only):** Tools including file review
- InstanetFAX® — **Fax Machine Icon:** Create an off-line fax coversheet
- CONTACTS — **Rolodex Icon:** Your Instanet contacts
- SETUP — **Gears Icon:** Customize your account settings and set up templates, clauses, transaction shares and more
- SWITCH — **Switch Icon:** Switch back to **old Instanet**, Pro and Lite, *until November 2016*
- LOGOUT — **Power Icon:** Log off of your Instanet account

instanet SOLUTIONS | Transaction DASHBOARD | User Guide

Transaction email address

Download transaction email

Top "Spotlight" Menu: More tools: Adding a template, importing data from Paragon or the assessor and deleting the transaction

Left-side "Burger" Menu: Shows descriptions of account tools

Listing Photo: Upload to keep track of your transactions

Transaction Name

Save button (checkmark)

"Speedometer": Click to go to your *Main Agent Dashboard User Guide*

Bottom "Spotlight" Menu: Reveals widgets that can be added

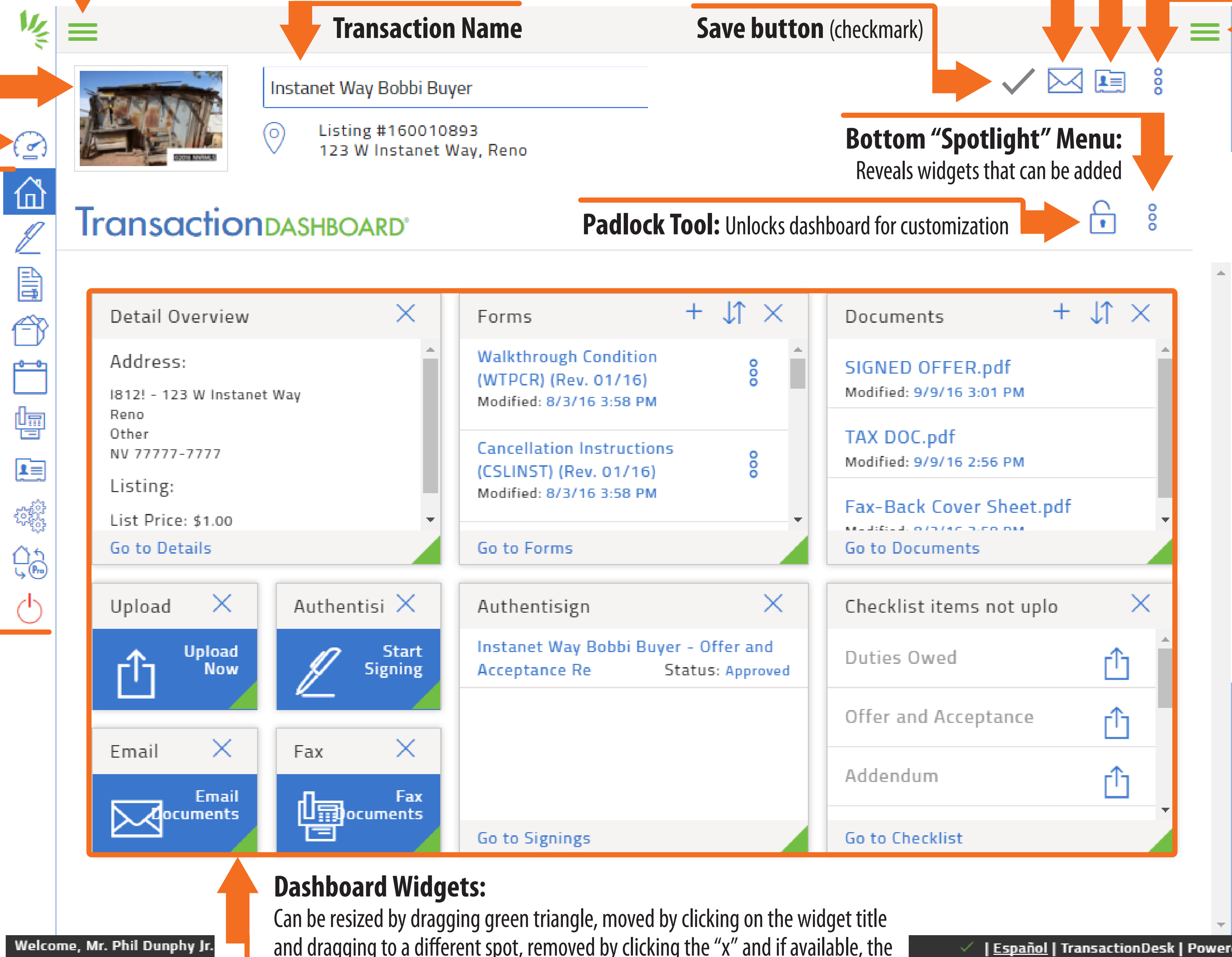
Padlock Tool: Unlocks dashboard for customization

Account Tools
Click here to view the *Agent Tools User Guide*

Right-side "Burger" Menu: Shows the Transaction Tools Toolbar

Transaction Wizard

Dashboard
Property Detail
Contacts
Forms
Documents
Checklist
Tasks
Signings
History
Service Orders
Call Logs

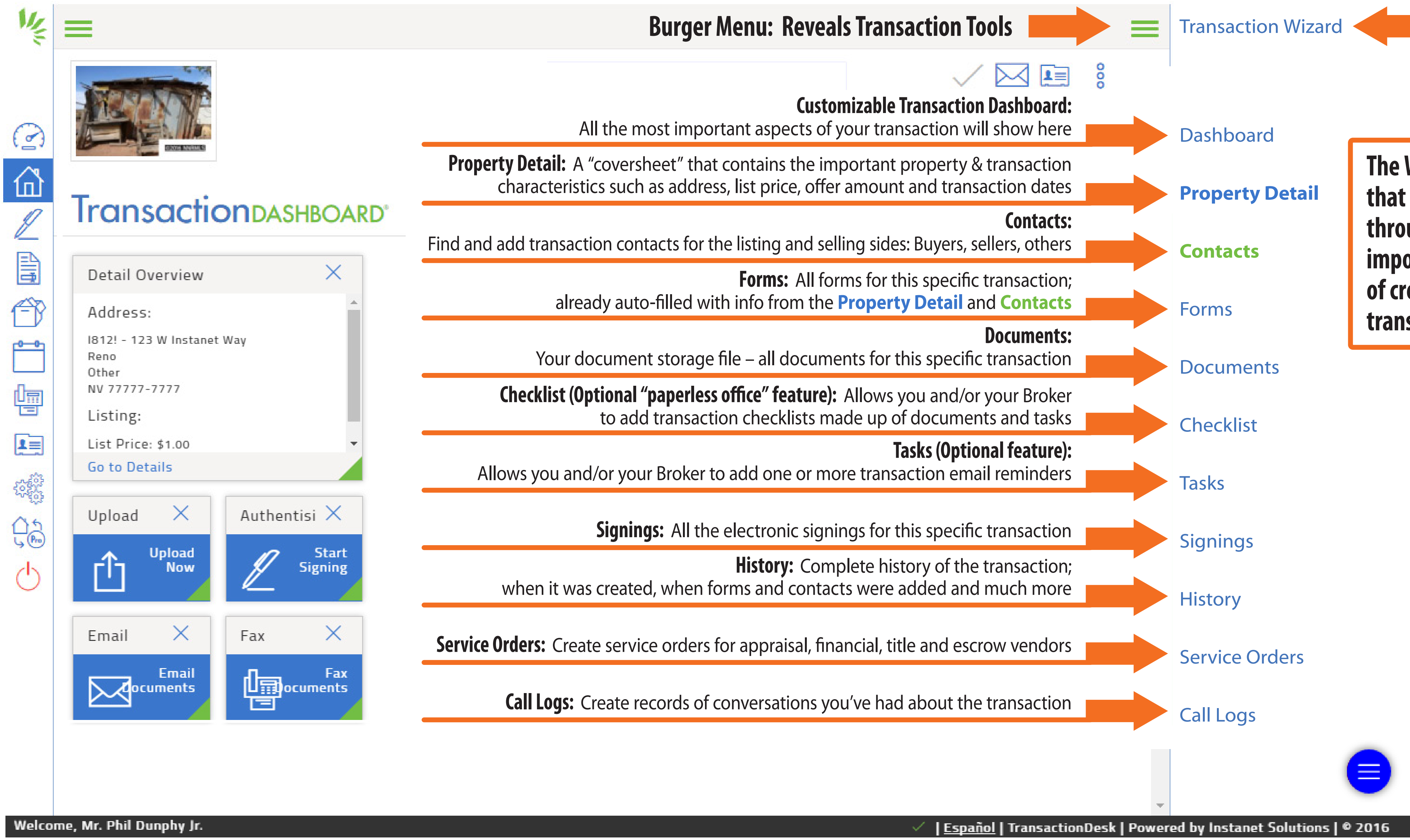


Dashboard Widgets:
Can be resized by dragging green triangle, moved by clicking on the widget title and dragging to a different spot, removed by clicking the "x" and if available, the opposing arrows can sort the widget contents

Transaction Tools Toolbar:
Click links to see different parts of your transaction (For even more details, refer to *Transaction Tools User Guide*

instanet SOLUTIONS | Transaction TOOLS | User Guide

(For the Agent Dashboard User Guide, Click Here)



Burger Menu: Reveals Transaction Tools

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

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

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

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

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

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

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

Signings: All the electronic signings for this specific transaction

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

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

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

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