

**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



The screenshot shows the Agent Dashboard interface. At the top left is the 'instanet SOLUTIONS' logo and the 'Agent DASHBOARD' title. Below the title is a 'Burger' menu icon (three horizontal lines). To the right of the title are three icons: a question mark, a padlock, and a stoplight menu. The main content area is divided into several widgets:
 

- Transactions:** A list of transactions including 'Wagtail Drive Timmy Buyer' (modified 7/21/16 1:43 PM), 'Rocky Mountain Listing TEST' (modified 7/19/16 2:33 PM), and 'Mt Olympus Juno TEST' (modified 7/18/16 8:44 AM). It includes a 'Create Transaction' button and a 'Go to Transactions' link.
- Authentisign:** A list of documents including 'Mt Olympus - Juno Buyer TEST O&A' (Status: Approved Associated, Transaction: Mt Olympus Juno TEST, modified 7/18/2016 8:44:12 AM) and 'Olympus Juno Duties TEST' (Status: Approved Associated, Transaction: Mt Olympus Juno TEST, modified 7/15/2016 10:20:13 AM). It includes a 'Start Signing' button and a 'Go to Signings' link.
- Documents:** A list of documents including two 'Offer and Acceptance.pdf' files (Transaction: Wagtail Drive Timmy Buyer, modified 7/21/16 1:38 PM). It includes a 'Go to Documents' link.

 On the left side, there is a vertical toolbar with icons for home, create transaction, authentisign, start signing, and other account tools. At the bottom, there is a 'Blue Burger' rolling menu with icons for help, feedback, and starting a transaction. The user's name 'Welcome, Mr. Phil Dunphy Jr.' is displayed at the bottom left.

## 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

**Listing Photo:** Upload to keep track of your transactions

**"Speedometer":** Click to go to your [Main Agent Dashboard User Guide](#)

**Account Tools** Click here to view the [Agent Tools User Guide](#)

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

**Transaction Name** Save button (checkmark)

**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

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

**Padlock Tool:** Unlocks dashboard for customization

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

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

**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

Welcome, Mr. Phil Dunphy Jr.

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**Burger Menu: Reveals Transaction Tools**

- Transaction Wizard**
- Dashboard**: Customizable Transaction Dashboard: All the most important aspects of your transaction will show here
- Property Detail**: **Property Detail:** A "coversheet" that contains the important property & transaction characteristics such as address, list price, offer amount and transaction dates
- Contacts**: **Contacts:** Find and add transaction contacts for the listing and selling sides: Buyers, sellers, others
- Forms**: **Forms:** All forms for this specific transaction; already auto-filled with info from the **Property Detail** and **Contacts**
- Documents**: **Documents:** Your document storage file – all documents for this specific transaction
- Checklist**: **Checklist (Optional "paperless office" feature):** Allows you and/or your Broker to add transaction checklists made up of documents and tasks
- Tasks**: **Tasks (Optional feature):** Allows you and/or your Broker to add one or more transaction email reminders
- Signings**: **Signings:** All the electronic signings for this specific transaction
- History**: **History:** Complete history of the transaction; when it was created, when forms and contacts were added and much more
- Service Orders**: **Service Orders:** Create service orders for appraisal, financial, title and escrow vendors
- Call Logs**: **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