TransactionDESK®

Great News – the Final Transition Phase of the New TransactionDesk is Here!

[Check Out a Brief Overview Video](#)

It's an all new platform that keeps all the best features of the old system in a new, more mobile friendly look and feel.

The new system is also streamlined so it's both easier to use and more powerful. Here are a few key highlights:

- The new TransactionDesk is dashboard based, so you can get more information and quicker access to things you need with fewer clicks.
- See recently created transactions, forms and signings right on your home page. Access them with one click.
- You can customize the dashboard so it works best for you.
- More mobile device and touch friendly. Easier to use on the go.
- Better organization for documents using subfolders. Drag and drop upload of files from your computer.
- All new transaction checklists to keep you organized.
- More powerful brokerage tools for company document and file management.

Moving to the New TransactionDesk is Easy

[This Video Shows how Easy it is to Make the Change](#)

Here is a list of the most important things to know when moving to the new system:

1. You have access to the new version of TransactionDesk now – if you haven't switched already you can do so upon login.

2. On January 1, 2017 you will automatically login to the new version. There is nothing else to do. The old version will no longer be available at this point.

3. All your transactions, forms, documents and data will be there in the new system - they already are! You'll still be using the same database, just a different interface on top of it.

4. Quick Start Groups have been merged with Transaction Templates. Any Quick Start Groups you created in the old system are now in the new system as Templates. You won't lose any work.

    When you start a transaction, indicate you want to use a template and you'll see your old Quick Start Groups listed there (and any templates you created in the old system).

    So, to add groups of forms to a transaction now, just choose a template.

5. We have a huge video library available within the system to help you. There are two main locations for help videos:

    a. On the left side of the screen is a (?) . Click on that icon and then on the link for Help Video.

      b.   You can always call 800-668-8768 for help. The help desk is trained on the new system.

6.   We'd love it if you emailed us at feedback@instanetsolutions.com with any comments or suggestions about the new system.

Videos for New TransactionDesk

Here is a compilation of useful short "how-do-I" videos:

Broker Dashboard Functions – https://vimeopro.com/user18881949/broker

Settings/User Preferences – https://vimeopro.com/user18881949/settingsuser-preferences

Stand Alone InstanetForms – https://vimeopro.com/user18881949/stand-alone-instanetforms

Authentisign – https://vimeopro.com/user18881949/authentisign

Stand Alone DocBox – https://vimeopro.com/user18881949/stand-alone-docbox

Transactions – https://vimeopro.com/user18881949/transaction-files

Widgets – https://vimeopro.com/user18881949/widgets

Training Links for the New TransactionDesk

Here is a compilation of free training links:

Sign up for upcoming webinar sessions on the new system here:
https://attendee.gototraining.com/832jg/catalog/109115080?tz=America/Chicago

Book a session with our company trainer for your office. (You choose the content, will only train on the new TD):
https://calendly.com/transactiondesk_training

We have pre-recorded webinar sessions located here for the new TransactionDesk:
https://vimeopro.com/user18881949/transactiondesk-new-full-length-videos