



TransactionDesk Release Notes: **12.13.00**



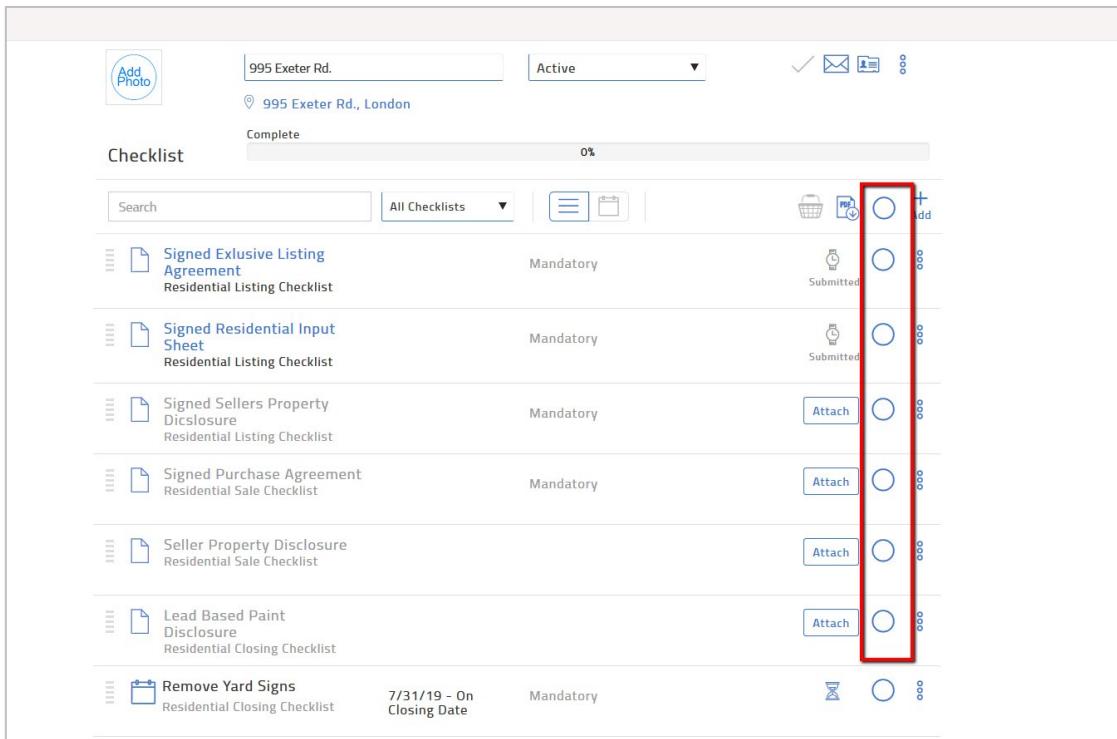
LONE WOLF
TECHNOLOGIES

lwolf.com
1.866.CRY.WOLF(279.9653)

Broker File Review Changes

1. Added ability to select and de-select all items in a checklist

What is the Benefit? For any user, it is now visually easier to perform bulk actions on checklist items regardless if they are just empty placeholders, tasks or an actual document has been uploaded into it.



The screenshot shows a software interface for managing a broker file. At the top, there is a header with a photo placeholder, the address '995 Exeter Rd.', a status dropdown set to 'Active', and several icons for saving, printing, and more. Below the header, the title 'Checklist' is displayed with a progress bar showing '0%'. The main area contains a table with the following data:

Item	Description	Type	Actions
<input type="checkbox"/>	Signed Exclusive Listing Agreement Residential Listing Checklist	Mandatory	<input type="checkbox"/> Submitted <input type="checkbox"/> Attach
<input type="checkbox"/>	Signed Residential Input Sheet Residential Listing Checklist	Mandatory	<input type="checkbox"/> Submitted <input type="checkbox"/> Attach
<input type="checkbox"/>	Signed Sellers Property Disclosure Residential Listing Checklist	Mandatory	<input type="checkbox"/> Submitted <input type="checkbox"/> Attach
<input type="checkbox"/>	Signed Purchase Agreement Residential Sale Checklist	Mandatory	<input type="checkbox"/> Submitted <input type="checkbox"/> Attach
<input type="checkbox"/>	Seller Property Disclosure Residential Sale Checklist		<input type="checkbox"/> Submitted <input type="checkbox"/> Attach
<input type="checkbox"/>	Lead Based Paint Disclosure Residential Closing Checklist		<input type="checkbox"/> Submitted <input type="checkbox"/> Attach
<input type="checkbox"/>	Remove Yard Signs Residential Closing Checklist	Mandatory	<input type="checkbox"/> Submitted <input type="checkbox"/> Attach

A red box highlights the column of checkboxes on the right side of the checklist table, indicating the ability to select and de-select all items in the checklist.

2. Updated document naming to display document's original file name after associated checklist item removed from queue or reset

What is the Benefit? As an agent, your documents will now return to their original name when they are removed from a checklist instead of retaining the checklist item name.

Add Photo

995 Exeter Rd.

Active

Documents

+
Add

Search

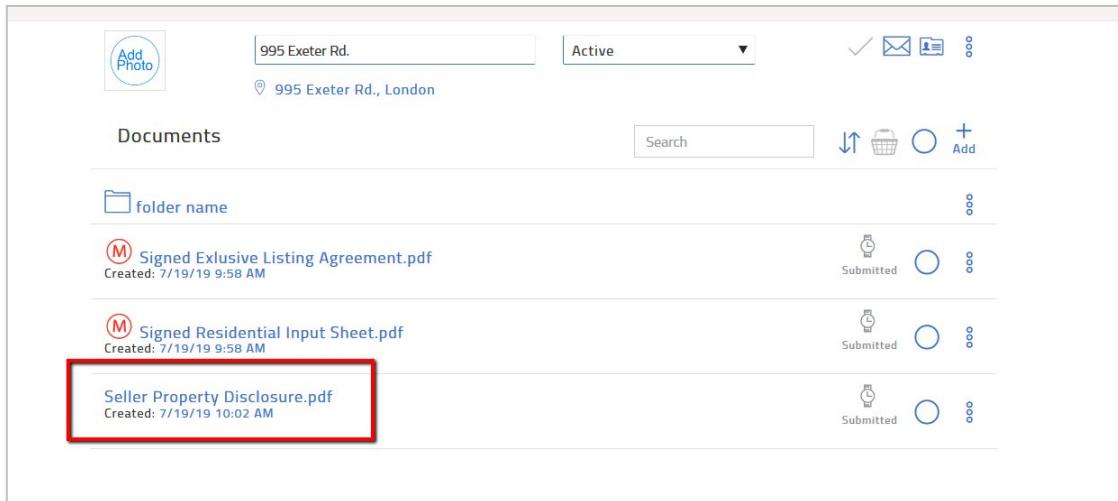
<span style="border: 1px solid #ccc; border-radius: 50%; padding: 5px; margin-right: 10

The screenshot shows a mobile application interface. At the top, there is a header with a location pin icon and the address '995 Exeter Rd.' Below this, a 'Documents' section lists several items with their creation dates:

- folder name
- (M) Signed Exclusive Listing Agreement
Created: 7/19/19 9:58 AM
- (M) Signed Residential Input Sheet
Created: 7/19/19 9:58 AM
- Authentisign Counter Offer Guide.
Created: 7/19/19 10:02 AM

A modal dialog box is open in the center, titled 'Assign to a Checklist Item'. It contains a 'Close' button and a 'Submit' button (which is highlighted with a red box). The dialog lists several checklist items with checkboxes:

Checklist Items		
Signed Exclusive Listing Agreement	Mandatory	<input type="checkbox"/>
Signed Residential Input Sheet	Mandatory	<input type="checkbox"/>
Signed Sellers Property Disclosure	Mandatory	<input type="checkbox"/>
Signed Purchase Agreement	Mandatory	<input type="checkbox"/>
Seller Property Disclosure		<input checked="" type="checkbox"/>
Lead Based Paint Disclosure		<input type="checkbox"/>
<input type="checkbox"/> I Don't Have a Checklist Item		



995 Exeter Rd. Active

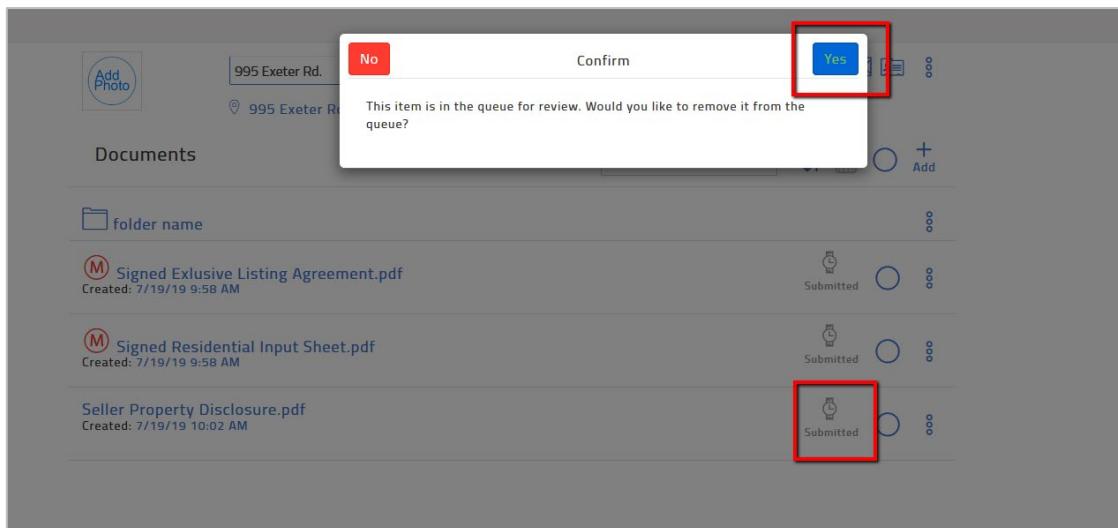
995 Exeter Rd., London

Documents

Search

Add

Seller Property Disclosure.pdf
Created: 7/19/19 10:02 AM



995 Exeter Rd.

995 Exeter Rd.

Documents

Confirm

No

Yes

This item is in the queue for review. Would you like to remove it from the queue?

Signed Exclusive Listing Agreement.pdf
Created: 7/19/19 9:58 AM

Signed Residential Input Sheet.pdf
Created: 7/19/19 9:58 AM

Seller Property Disclosure.pdf
Created: 7/19/19 10:02 AM

995 Exeter Rd. Active

995 Exeter Rd., London

Documents

Search

Add

folder name

(M) Signed Exclusive Listing Agreement.pdf
Created: 7/19/19 9:58 AM

(M) Signed Residential Input Sheet.pdf
Created: 7/19/19 9:58 AM

Authentisign Counter Offer Guide.pdf
Created: 7/19/19 10:02 AM

Submitted

Submitted

Submit

3. Change the behavior of Documents and Checklist Items removed from queue or reset

What is the Benefit? For an agent, it is now clearer how to resubmit an item to a checklist after it was removed from review.

995 Exeter Rd. Active

995 Exeter Rd., London

Complete

0%

Checklist

Search

All Checklists

Add

Signed Exclusive Listing Agreement
Residential Listing Checklist

Mandatory

Submitted

Signed Residential Input Sheet
Residential Listing Checklist

Mandatory

Submitted

Signed Sellers Property Disclosure
Residential Listing Checklist

Mandatory

Attach

Attached

Signed Purchase Agreement
Residential Sale Checklist

Mandatory

Attach



995 Exeter Rd., London

Complete

0%

Checklist

		Mandatory	
	Signed Exclusive Listing Agreement Residential Listing Checklist	<input type="radio"/>	
	Signed Residential Input Sheet Residential Listing Checklist	<input type="radio"/>	
	Signed Sellers Property Disclosure Residential Listing Checklist	<input type="radio"/>	
	Signed Purchase Agreement Residential Sale Checklist	<input type="radio"/>	

The screenshot shows a software interface with a modal dialog box in the center. The dialog has a red border and contains the text: "This item is in the queue for review. Would you like to remove it from the queue?". At the top left is a red "No" button, and at the top right is a blue "Yes" button. The background of the interface shows a "Checklist" section with a search bar, a dropdown menu for "All Checklists", and several checklist items listed below. One item is highlighted with a red box around its "Submitted" status indicator.

The screenshot shows a software interface for managing property listings. At the top, there are fields for 'Address' (995 Exeter Rd.) and 'Status' (Active). Below this is a 'Checklist' section with a progress bar at 0%. The checklist contains several items:

- Signed Exclusive Listing Agreement (Residential Listing Checklist) - Mandatory, Submitted
- Signed Residential Input Sheet (Residential Listing Checklist) - Mandatory, Submitted
- Signed Sellers Property Disclosure (Residential Listing Checklist)** - Mandatory, highlighted with a red box. It has an 'Attach' button and a status indicator.
- Signed Purchase Agreement (Residential Sale Checklist) - Mandatory, with an 'Attach' button and a status indicator.

4. Ability to create and display 'Assign to Checklist Modal' for Submitting a document to a checklist item in a single step

What is the Benefit? For a brokerage, a new 'office setting' now exists called 'require agents to assign documents to checklist items'. When enabled, agents will be prompted to assign documents to checklist item before turning into the office instead of submitting without associating the document to a checklist. By default this setting is disabled, given some offices review documents without checklists, however, we recommend it be enabled for most offices and in the future it may become enabled by default.

The screenshot shows the 'Broker Tools' menu. On the left is a vertical toolbar with icons for different functions. The main menu on the right lists several options:

- Review Documents
- Office Transactions
- Office Tasks
- Agents
- Reports
- Office Settings** - highlighted with a red box
- Authentisign Templates
- Canned Notes

Lonewolf Technologies, 55 Cambridge Rd London AL 90210

Allow Agents to Delete Transactions	Yes
Show Vendors to Participants	Yes
Force Agents to use Templates	Yes
Task Reminders for:	Summarized daily reminder
Time of day:	9 AM :00
<input type="checkbox"/> Show completed tasks	
Only track Mandatory Items in Progress Bar	No
Require Agents to Assign Documents to Checklist Items	Yes

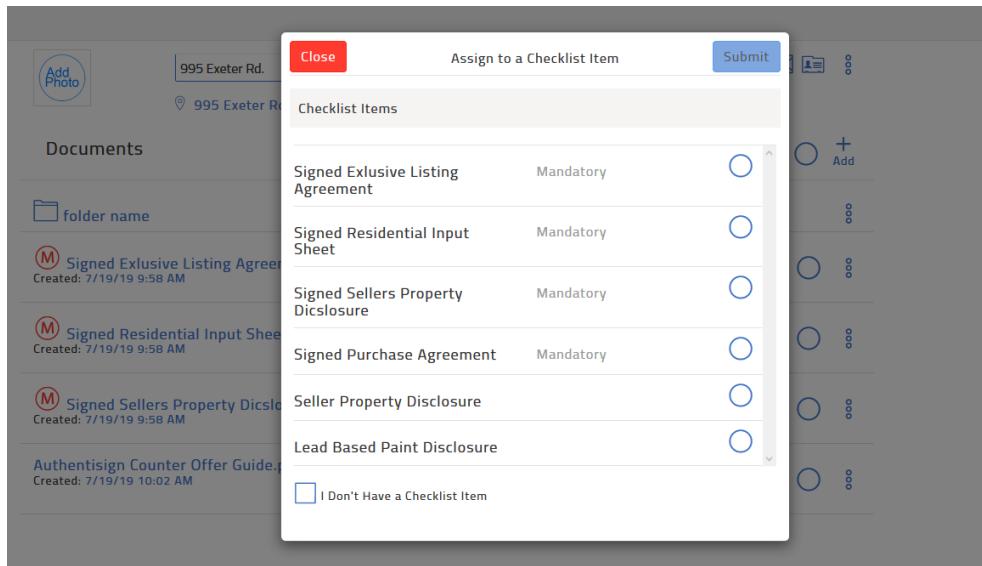
Update

995 Exeter Rd. Active ✓

995 Exeter Rd., London

Documents

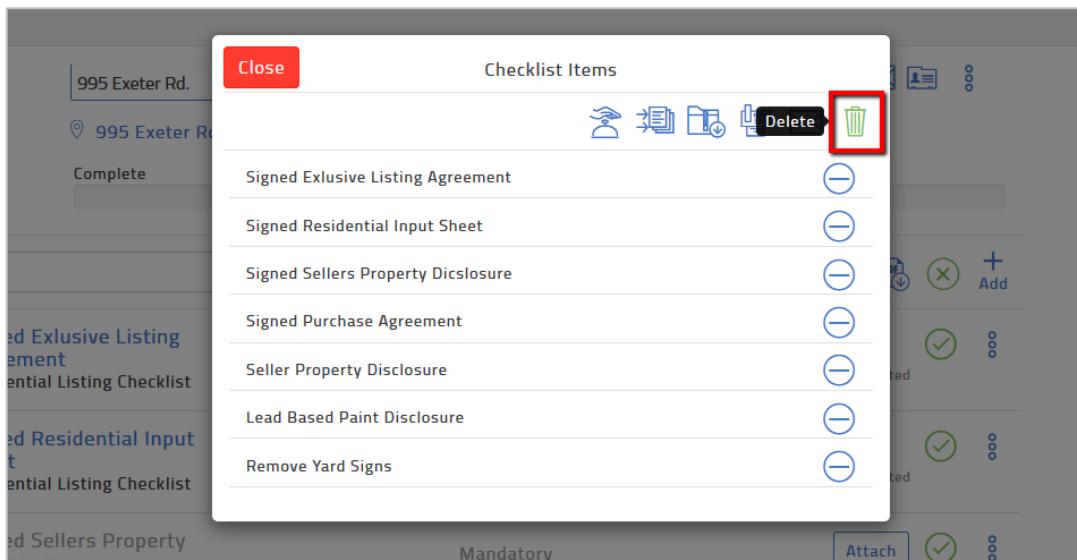
Search	Up	Down	Remove	Add
<input type="text"/>				
<input type="text"/> folder name				
Signed Exclusive Listing Agreement.pdf Created: 7/19/19 9:58 AM				
Signed Residential Input Sheet.pdf Created: 7/19/19 9:58 AM				
Signed Sellers Property Disclosure.pdf Created: 7/19/19 9:58 AM				
Authentisign Counter Offer Guide.pdf Created: 7/19/19 10:02 AM				



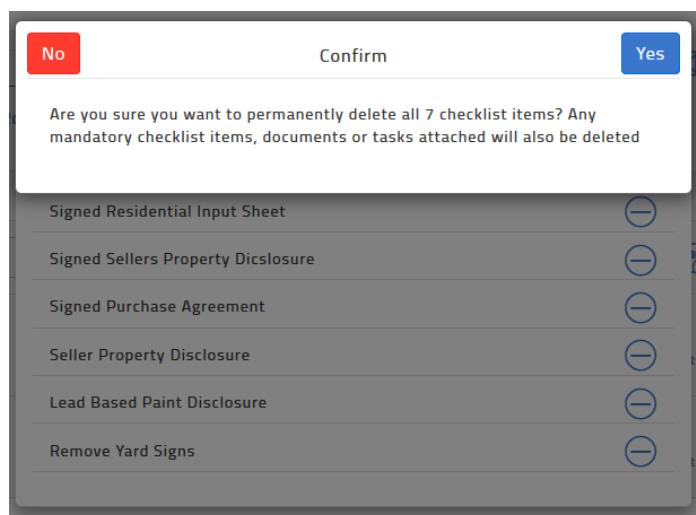
5. Added 'Delete' Option to the Bulk Actions for Checklists

What is the Benefit? As staff, you can now delete checklist items in bulk if you've added a checklist by accident or realize the deal fell through and a new checklist needs to be applied.

Item	Type	Status	Action
Signed Exclusive Listing Agreement	Mandatory	Submitted	Attachment
Signed Residential Input Sheet	Mandatory	Submitted	Attachment
Signed Sellers Property Disclosure	Mandatory	Attachment	Attachment
Signed Purchase Agreement	Mandatory	Attachment	Attachment

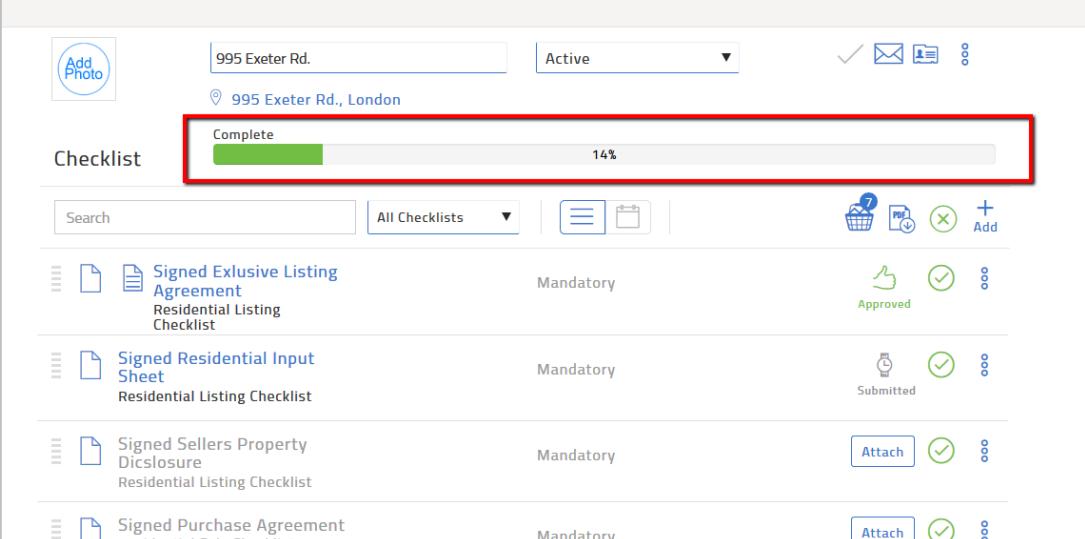


Note: Only super users can delete mandatory checklist items.



6. Updated location of the progress bar & checklist toolbar

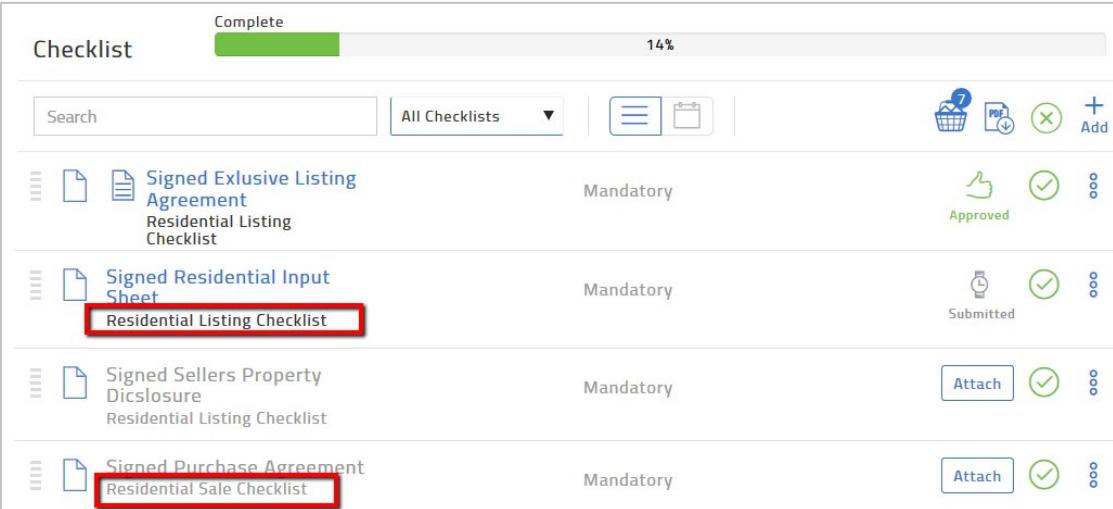
What is the Benefit? As any user, when viewing a transaction checklist the search will appear directly above the checklist items which is more conventional. The progress bar is now at the top.



The screenshot shows a transaction checklist for a property at 995 Exeter Rd., London. The progress bar is at the top, showing 'Complete' and '14%'. Below it is a toolbar with search, filter, and action buttons. The main list contains four checklist items: 'Signed Exclusive Listing Agreement' (Approved), 'Signed Residential Input Sheet' (Submitted), 'Signed Sellers Property Disclosure' (Pending), and 'Signed Purchase Agreement' (Pending). Each item has an 'Attach' button and a more options menu.

7. Introduced "parent" checklist name to individual checklist items

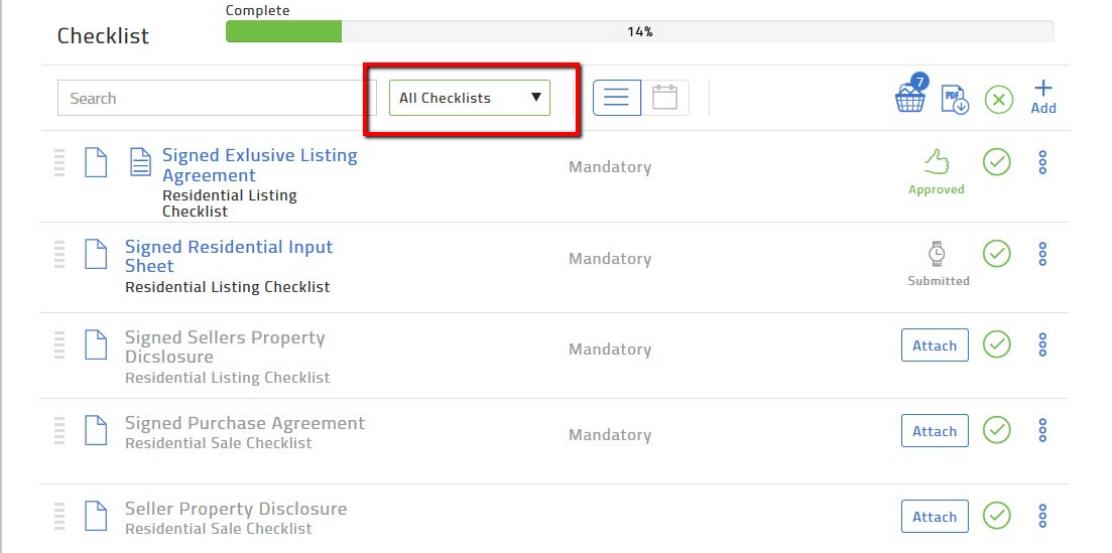
What is the Benefit? As any user, you can now see the name of the checklist on any transaction checklist items, ie. listing vs. pending vs. closed checklist, making it easier to see what tasks are due throughout each milestone of the deal.



The screenshot shows the same transaction checklist as above, but with the addition of parent checklist names in parentheses next to the individual items. The 'Signed Residential Input Sheet' is now labeled 'Residential Listing Checklist' and the 'Signed Purchase Agreement' is labeled 'Residential Sale Checklist'.

8. Introduce "parent" Checklist filter to Transaction Checklists Tab

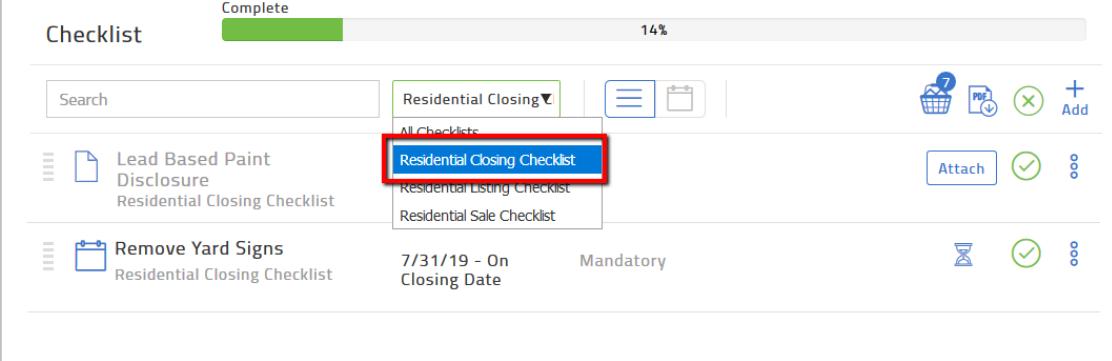
What is the Benefit? As an agent, you can now filter transaction checklist items by the checklist, ie. only items from your listing vs. pending vs. closed checklist.



The screenshot shows a list of transaction checklists. At the top, there is a dropdown menu labeled "All Checklists" with a red box around it. The list includes:

- Signed Exclusive Listing Agreement (Residential Listing Checklist)
- Signed Residential Input Sheet (Residential Listing Checklist)
- Signed Sellers Property Disclosure (Residential Listing Checklist)
- Signed Purchase Agreement (Residential Sale Checklist)
- Seller Property Disclosure (Residential Sale Checklist)

Each item has a status indicator (Mandatory), a progress bar (14%), and buttons for "Attach" and "Approved".



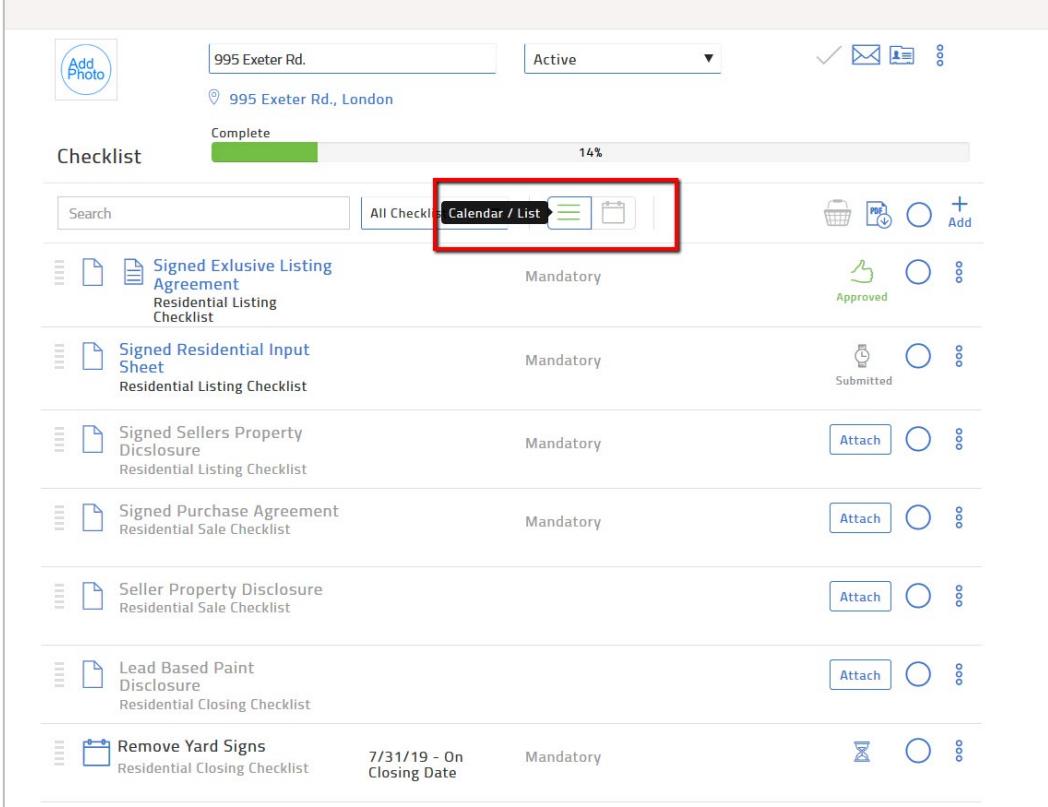
The screenshot shows a list of transaction checklists. At the top, there is a dropdown menu labeled "Residential Closing" with a red box around it. The list includes:

- Lead Based Paint Disclosure (Residential Closing Checklist)
- Remove Yard Signs (Residential Closing Checklist)

Each item has a status indicator (Mandatory), a progress bar (14%), and buttons for "Attach" and "Approved".

9. Converted List/Calendar view icons to a toggle switch

What is the Benefit? As any user, you can now more easily see checklist items in a calendar view. Previously, users were not aware that a calendar view existed on the transaction checklist.



The screenshot shows a transaction checklist for property 995 Exeter Rd., London. The top navigation bar includes fields for address, status (Active), and various icons for saving, printing, and more. Below this is a progress bar showing 'Complete' at 14%. The main area is a 'Checklist' table with the following data:

Checklist Item	Type	Actions
Signed Exclusive Listing Agreement Residential Listing Checklist	Mandatory	Approved
Signed Residential Input Sheet Residential Listing Checklist	Mandatory	Submitted
Signed Sellers Property Disclosure Residential Listing Checklist	Mandatory	Attach
Signed Purchase Agreement Residential Sale Checklist	Mandatory	Attach
Seller Property Disclosure Residential Sale Checklist		Attach
Lead Based Paint Disclosure Residential Closing Checklist		Attach
Remove Yard Signs Residential Closing Checklist	7/31/19 - On Closing Date	Mandatory

A red box highlights the 'Calendar / List' toggle switch at the top of the checklist table. The 'List' option is selected, showing the items as a grid. The 'Calendar' option is also visible.

995 Exeter Rd. Active ✓ ✉️ 🖨️ 🕒

995 Exeter Rd., London

Checklist Complete 14%

Search All Checklists 📅 🖨️ ➕

Today July 2019 Month Week Day

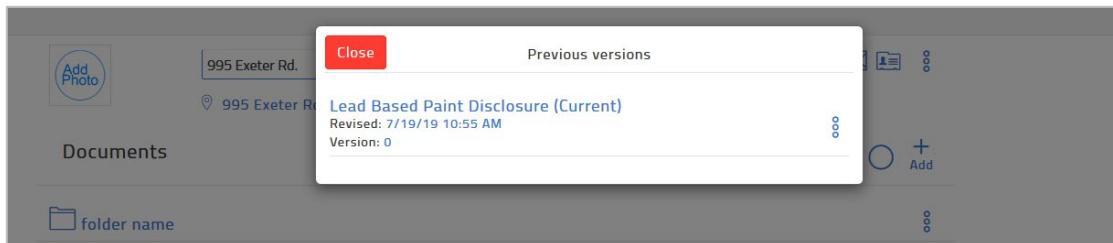
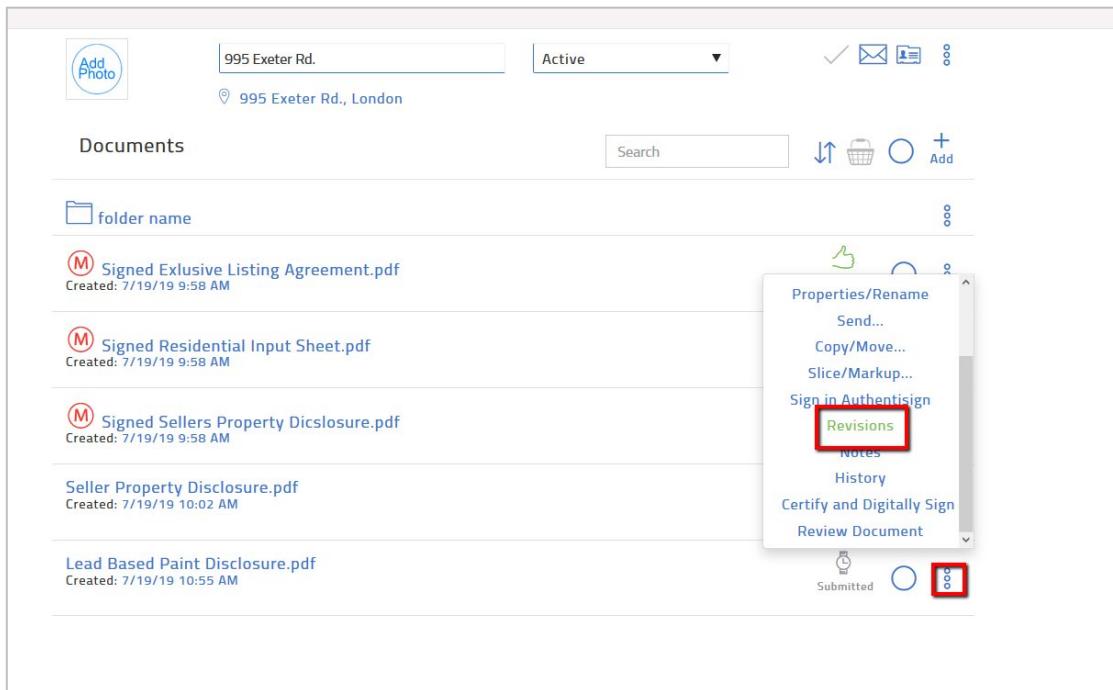
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Remove Yard Signs

10. Added ability to assign Docs to checklists from the Assign to Checklist Item screen

What is the Benefit? For a brokerage, provided the setting is enabled, agents will be prompted to submit documents to a checklist when turning in paperwork. Previously, agents could 'ring the bell' without choosing any checklist item, defeating the purpose of the checklist.

New Behavior: When you upload a document to a checklist item that already has a document within it, then your document will take precedence and the previous document will become a revision. Also if you use the checkbox "no checklist item" it will create a brand new checklist item and add that document to it. If you select a checklist item and hit close without hitting accept it will not provide a confirmation popup to see if you meant to perform that action.



995 Exeter Rd. Active

995 Exeter Rd., London

Documents

Search

Add

folder name

Signed Exclusive Listing Agreement.pdf
Created: 7/19/19 9:58 AM

Signed Residential Input Sheet.pdf
Created: 7/19/19 9:58 AM

Signed Sellers Property Disclosure.pdf
Created: 7/19/19 9:58 AM

Seller Property Disclosure.pdf
Created: 7/19/19 10:02 AM

Lead Based Paint Disclosure.pdf
Created: 7/19/19 10:55 AM

Approved

Submitted

Submit

995 Exeter Rd.

995 Exeter Rd.

Documents

folder name

Signed Exclusive Listing Agreement.pdf
Created: 7/19/19 9:58 AM

Signed Residential Input Sheet.pdf
Created: 7/19/19 9:58 AM

Signed Sellers Property Disclosure.pdf
Created: 7/19/19 9:58 AM

Seller Property Disclosure.pdf
Created: 7/19/19 10:02 AM

Assign to a Checklist Item

Close

Submit

Checklist Items

Signed Residential Input Sheet Mandatory

Signed Sellers Property Disclosure Mandatory

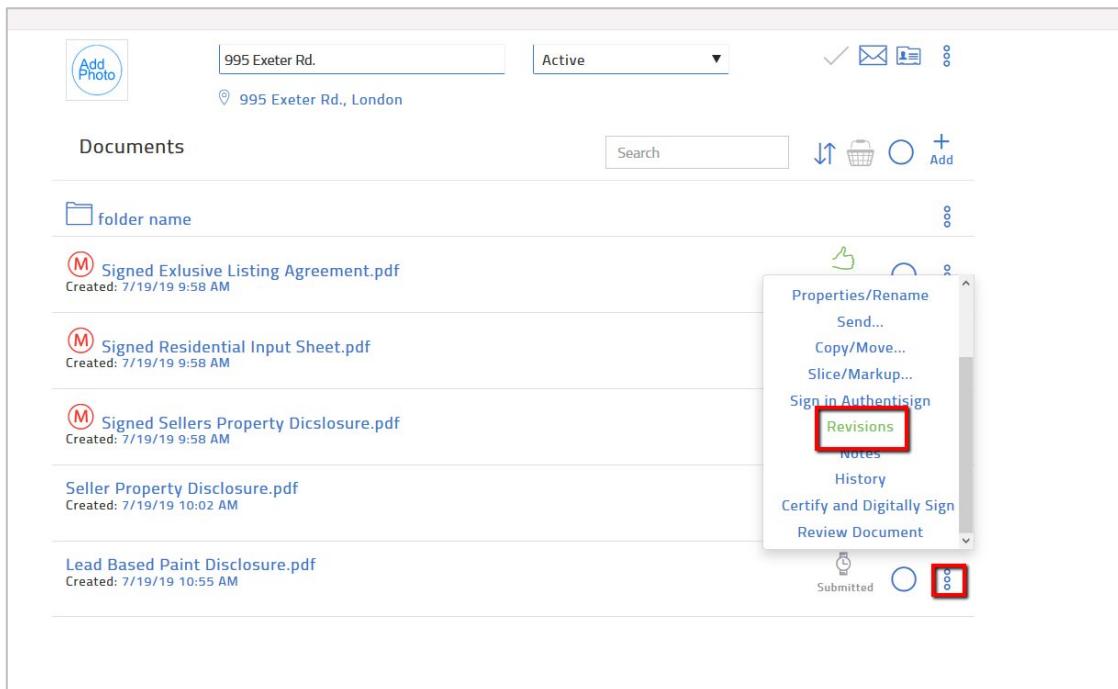
Signed Purchase Agreement Mandatory

Seller Property Disclosure

Lead Based Paint Disclosure

I Don't Have a Checklist Item

Submitted



995 Exeter Rd. Active

995 Exeter Rd., London

Documents

Search

Add

folder name

(M) Signed Exclusive Listing Agreement.pdf
Created: 7/19/19 9:58 AM

(M) Signed Residential Input Sheet.pdf
Created: 7/19/19 9:58 AM

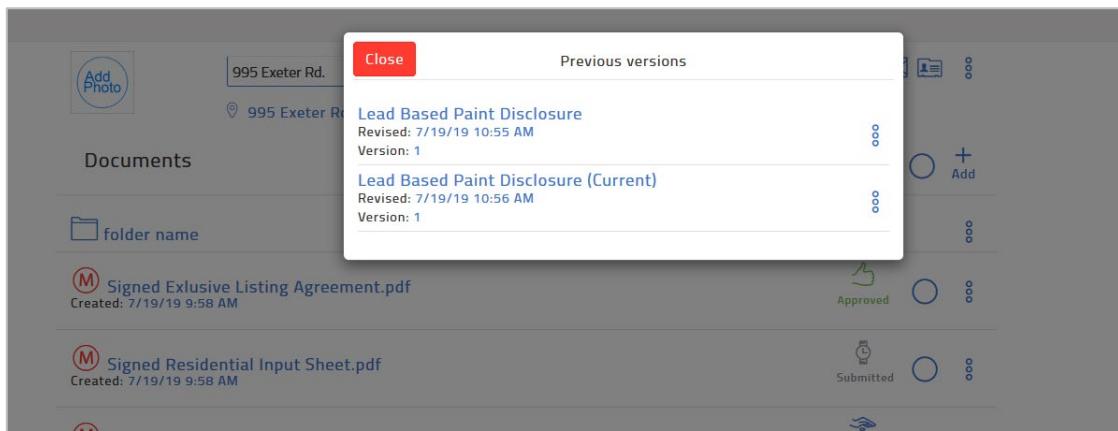
(M) Signed Sellers Property Disclosure.pdf
Created: 7/19/19 9:58 AM

Seller Property Disclosure.pdf
Created: 7/19/19 10:02 AM

Lead Based Paint Disclosure.pdf
Created: 7/19/19 10:55 AM

Properties/Rename
Send...
Copy/Move...
Slice/Markup...
Sign in AuthenticSign
Revisions (highlighted)
Notes
History
Certify and Digitally Sign
Review Document

Submitted



995 Exeter Rd.

995 Exeter Rd.

Documents

folder name

(M) Signed Exclusive Listing Agreement.pdf
Created: 7/19/19 9:58 AM

(M) Signed Residential Input Sheet.pdf
Created: 7/19/19 9:58 AM

Close

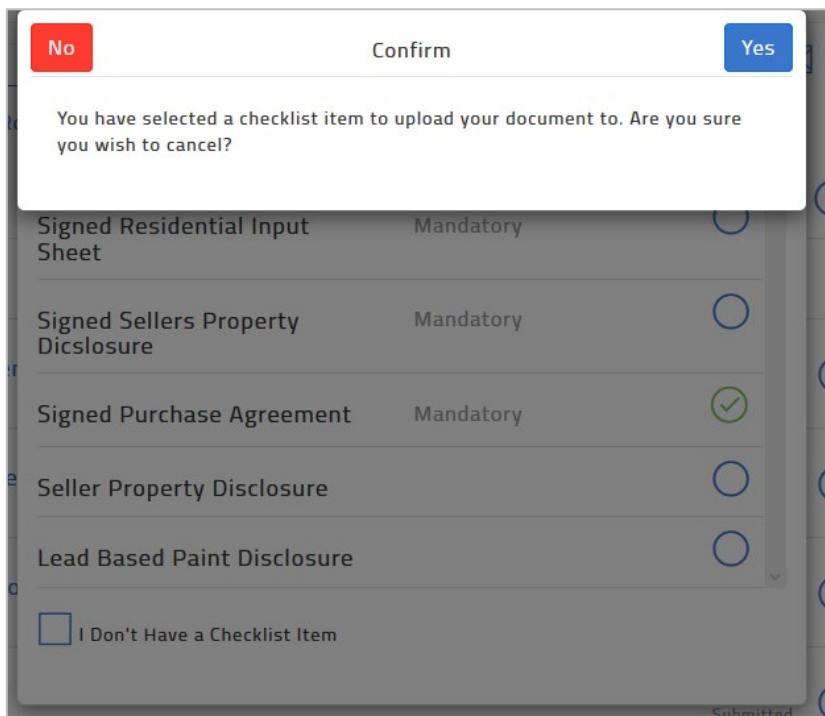
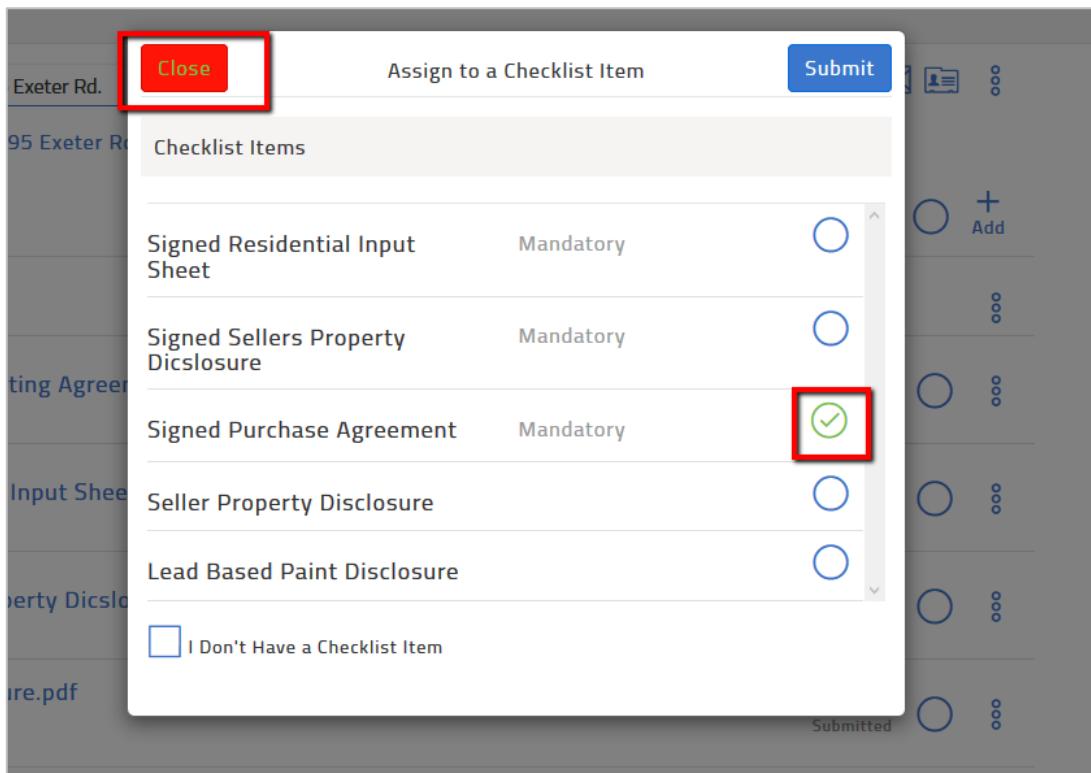
Previous versions

Lead Based Paint Disclosure
Revised: 7/19/19 10:55 AM
Version: 1

Lead Based Paint Disclosure (Current)
Revised: 7/19/19 10:56 AM
Version: 1

Approved

Submitted



995 Exeter Rd. Active

995 Exeter Rd., London

Documents

Search

Add

folder name

(M) Signed Exclusive Listing Agreement.pdf
Created: 7/19/19 9:58 AM

(M) Signed Residential Input Sheet.pdf
Created: 7/19/19 9:58 AM

(M) Signed Sellers Property Disclosure.pdf
Created: 7/19/19 9:58 AM

Seller Property Disclosure.pdf
Created: 7/19/19 10:02 AM

Lead Based Paint Disclosure.pdf
Created: 7/19/19 10:55 AM

Authentisign Print Driver Guide.pdf
Created: 7/19/19 10:58 AM

Submit

Assign to a Checklist Item

Close

Submit

Checklist Items

Signed Residential Input Sheet Mandatory

Signed Sellers Property Disclosure Mandatory

Signed Purchase Agreement Mandatory

Seller Property Disclosure

Lead Based Paint Disclosure

I Don't Have a Checklist Item

995 Exeter Rd. Active

995 Exeter Rd., London

Checklist Complete 13%

Search All Checklists

Signed Residential Input Sheet
Residential Listing Checklist

Signed Sellers Property Disclosure
Residential Listing Checklist

Signed Purchase Agreement
Residential Sale Checklist

Seller Property Disclosure
Residential Sale Checklist

Lead Based Paint Disclosure
Residential Closing Checklist

Remove Yard Signs
Residential Closing Checklist 7/31/19 - On Closing Date Mandatory

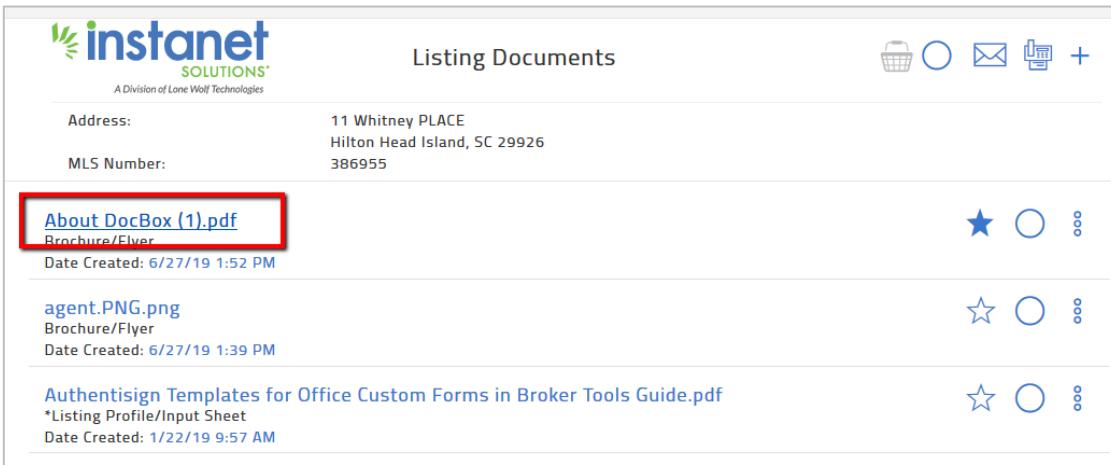
Authentisign Print Driver Guide

Submitted

Dashboard Details Contacts Forms Signings Documents **Checklist** Tasks Call Logs Service Orders History

Other Notable Changes

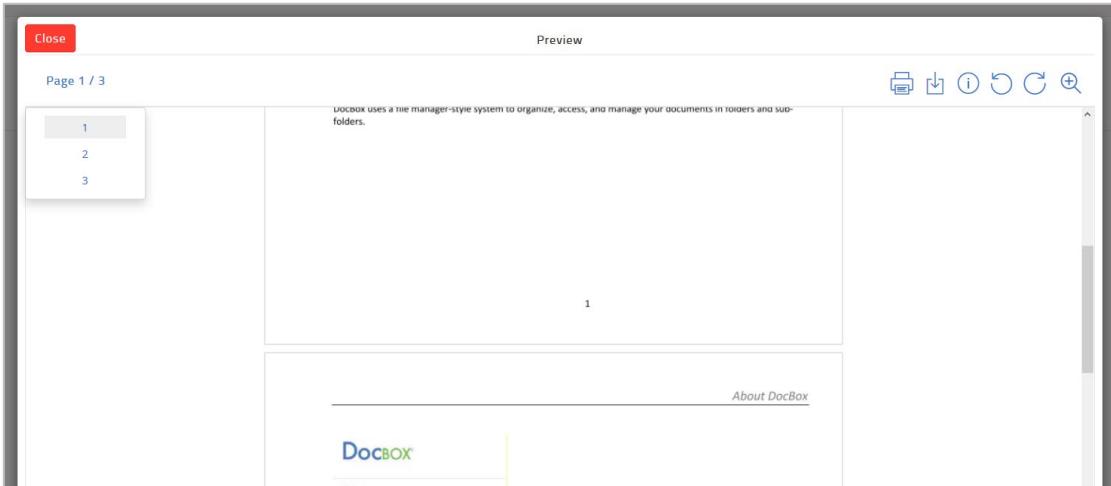
1. Listing Document Hosting - Apply new multi-page previewer to External Docs view



The screenshot shows the 'Listing Documents' page from instanet SOLUTIONS. At the top, the instanet logo and 'A Division of Lone Wolf Technologies' are displayed. Below this, the listing details are shown: Address: 11 Whitney PLACE, Hilton Head Island, SC 29926, MLS Number: 386955. The main content area lists three documents:

- About DocBox (1).pdf**
Brochure/Flyer
Date Created: 6/27/19 1:52 PM
- agent.PNG.png**
Brochure/Flyer
Date Created: 6/27/19 1:39 PM
- Authentisign Templates for Office Custom Forms in Broker Tools Guide.pdf**
*Listing Profile/Input Sheet
Date Created: 1/22/19 9:57 AM

Each document entry includes a star rating, a circular rating, and a more options menu icon.



The screenshot shows a multi-page previewer for the 'About DocBox' document. The top bar includes a 'Close' button and a 'Preview' label. The preview area shows the first page of the document, which contains the text: 'Docbox uses a file manager-style system to organize, access, and manage your documents in folders.' Below this, there is a navigation bar with icons for printing, saving, and other document operations. The page number 'Page 1 / 3' is visible at the top left of the preview area.

Bug Fixes

1. Authentisign updated to ensure errors do not occur when attempting to upload documents when completed to One Drive in Authentisign
2. Improved Form Population so contacts with preferred name fields will not wipe each other out. When removing contacts on forms it will only remove the specified contact not others that have the same preferred name