TransactionDesk Release Notes: **12.13.00**

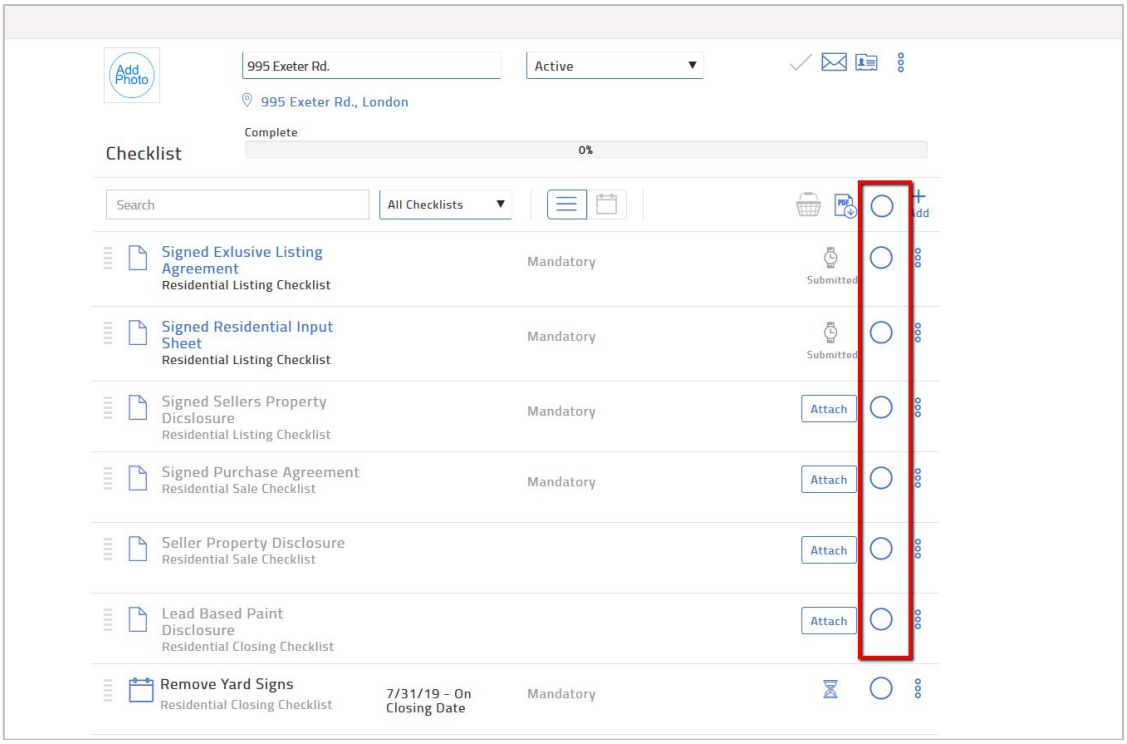
LONE WOLF
TECHNOLOGIES

lwolf.com
1.866.CRY.WOLF(279.9653)

Broker File Review Changes

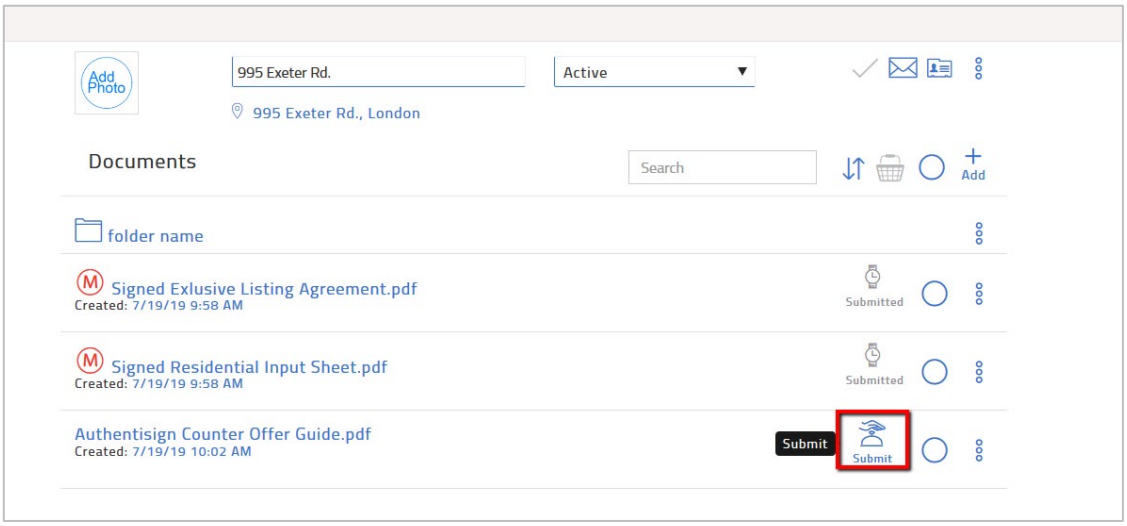
1. Added ability to select and de-select all items in a checklist

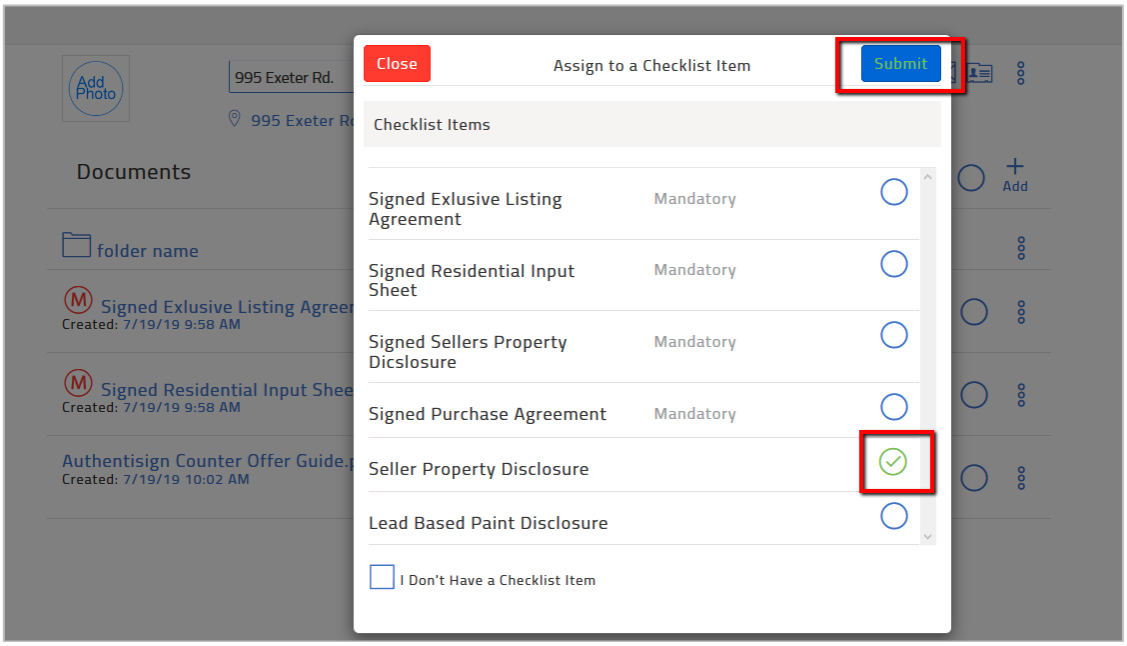
What is the Benefit? For any user, it is now visually easier to perform bulk actions on checklist items regardless if they are just empty placeholders, tasks or an actual document has been uploaded into it.

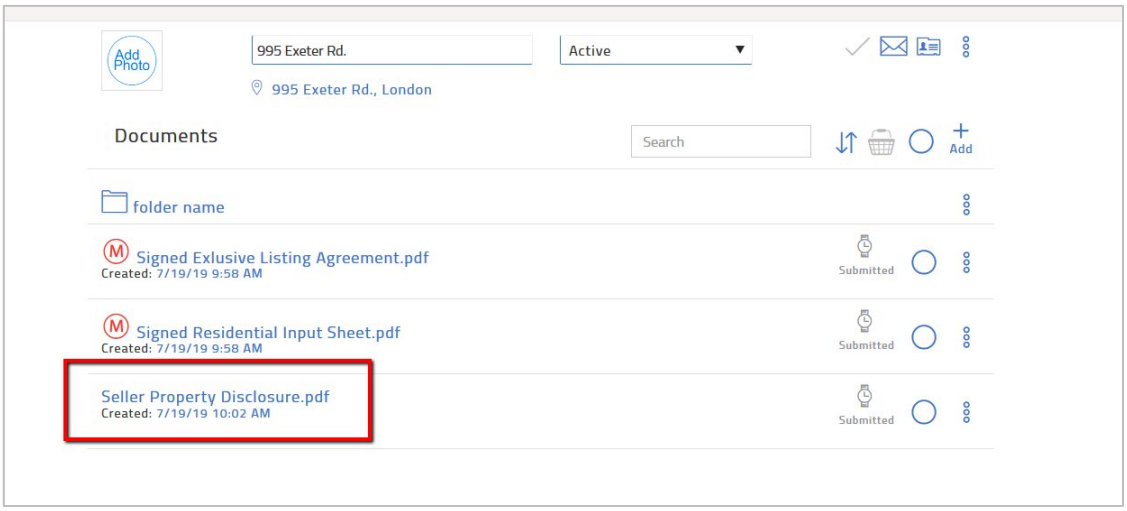


2. Updated document naming to display document's original file name after associated checklist item removed from queue or reset

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.



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Signed Exlusive Listing Agreement.pdf
Created: 7/19/19 9:58 AM
Submitted
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Seller Property Disclosure.pdf
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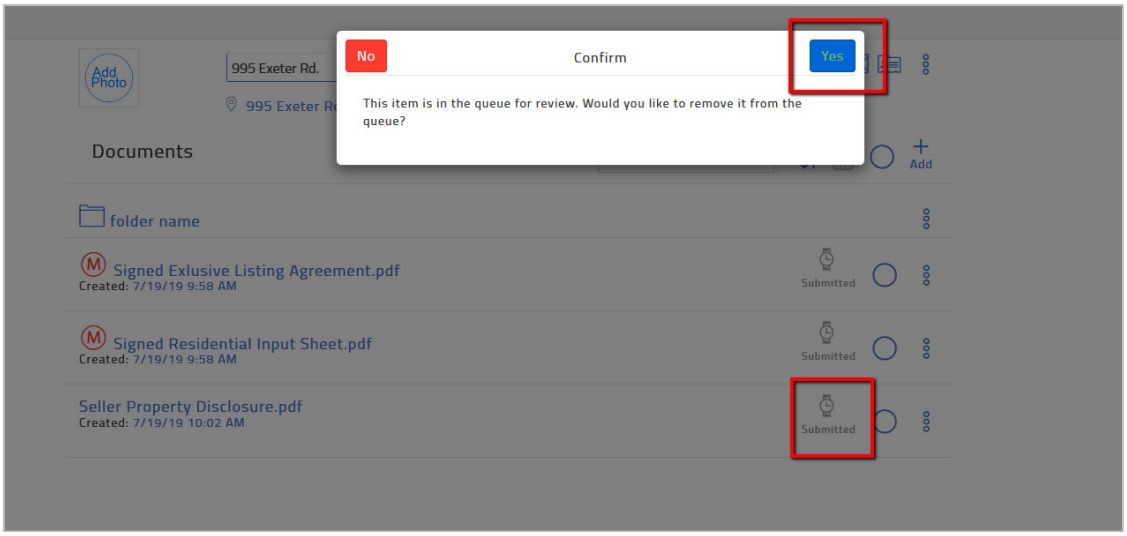
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This item is in the queue for review. Would you like to remove it from the queue?
Add Photo
995 Exeter Rd.
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Signed Exlusive Listing Agreement.pdf
Created: 7/19/19 9:58 AM
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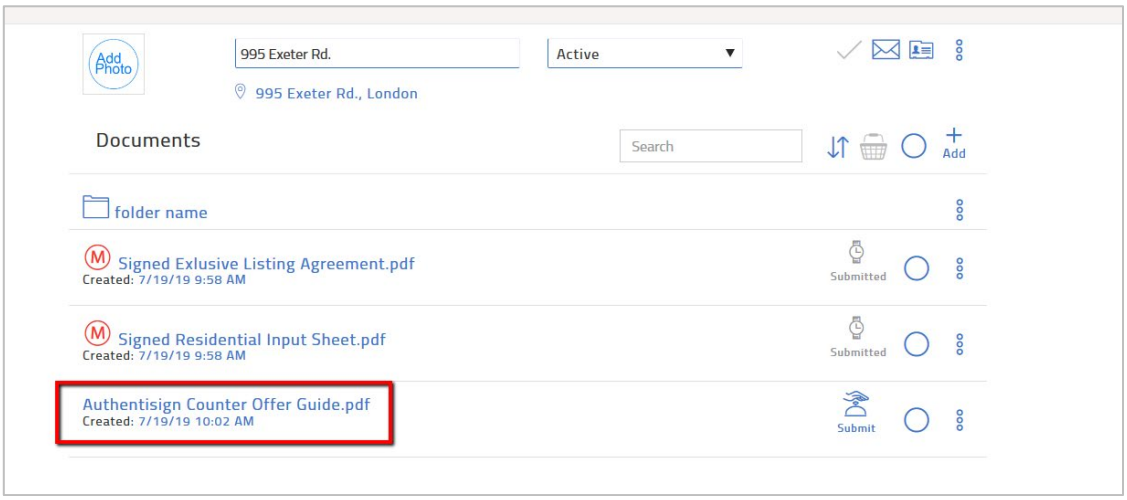
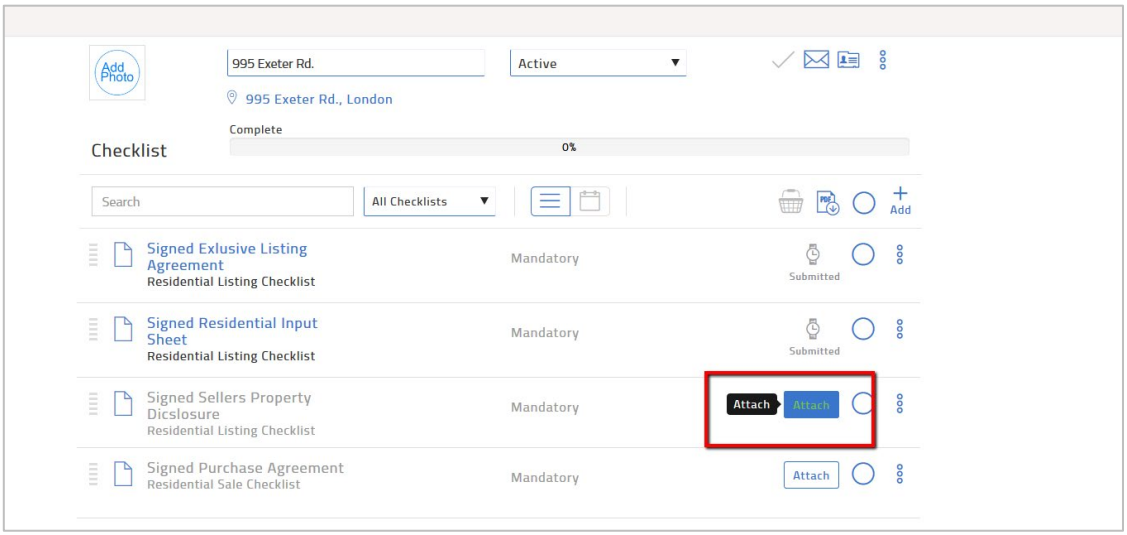
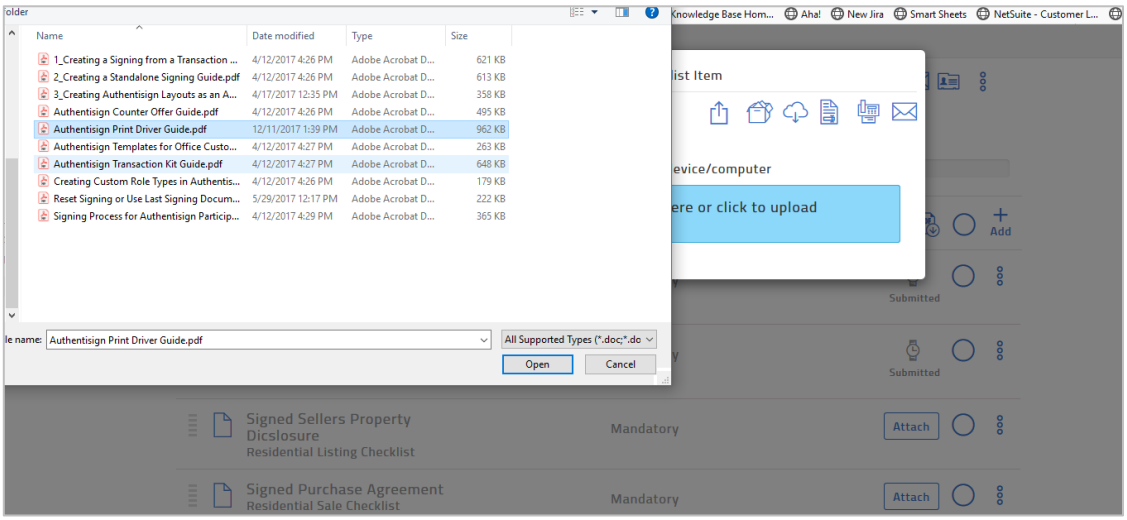


3. Change the behavior of Documents and Checklist Items removed from queue or reset

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.

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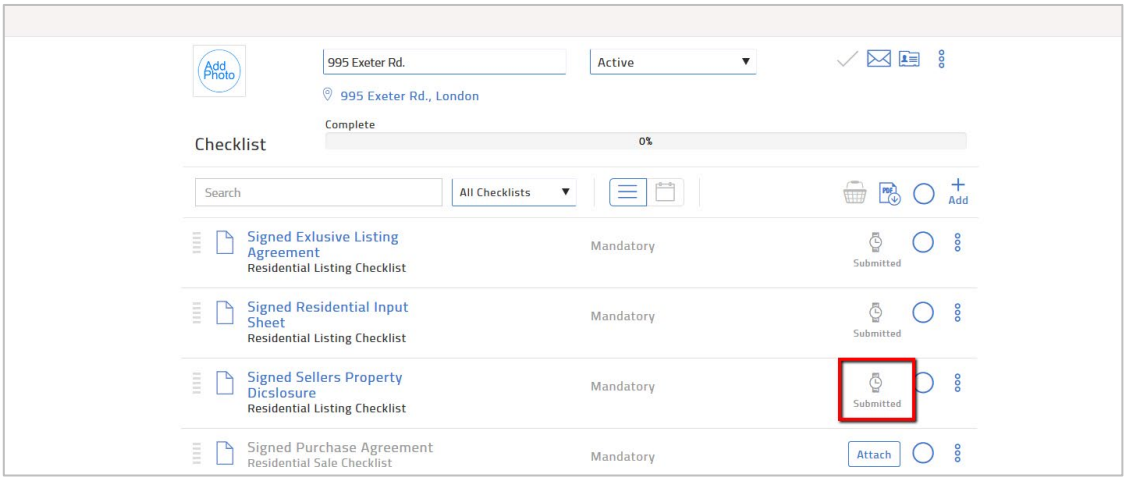
Attach
Signed Purchase Agreement
Residential Sale Checklist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Signed Sellers Property Dicslosure
Signed Purchase Agreement
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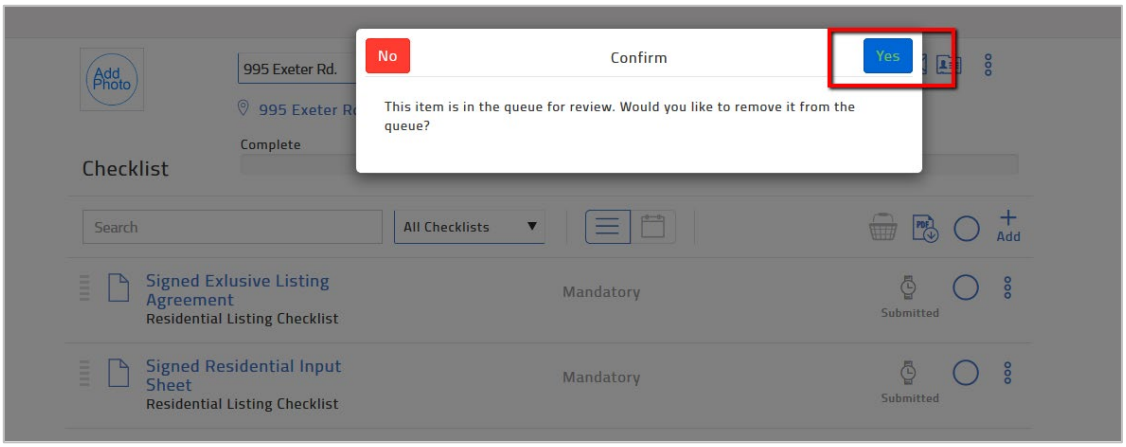
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This item is in the queue for review. Would you like to remove it from the queue?
Checklist
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Residential Listing Checklist
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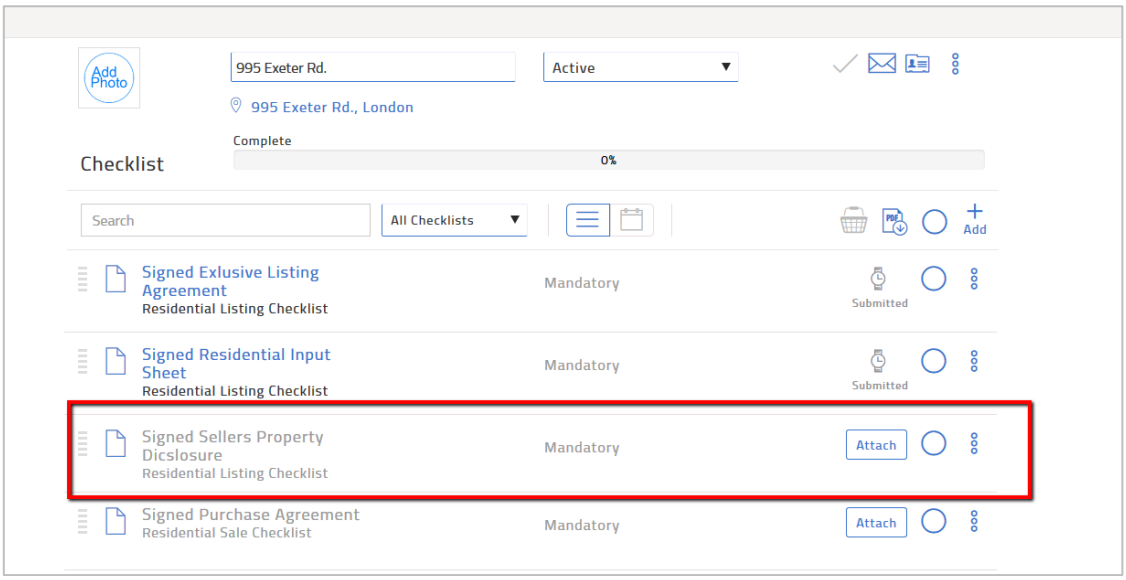
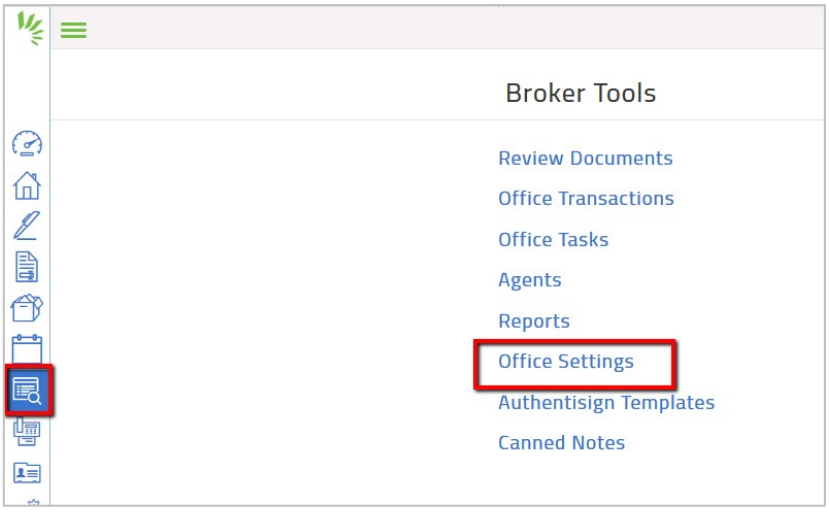
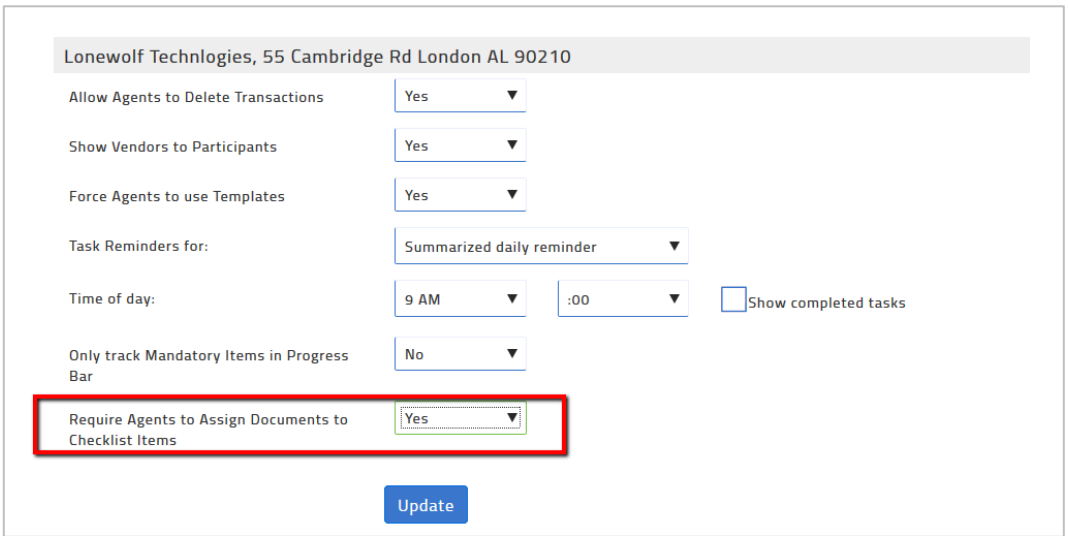
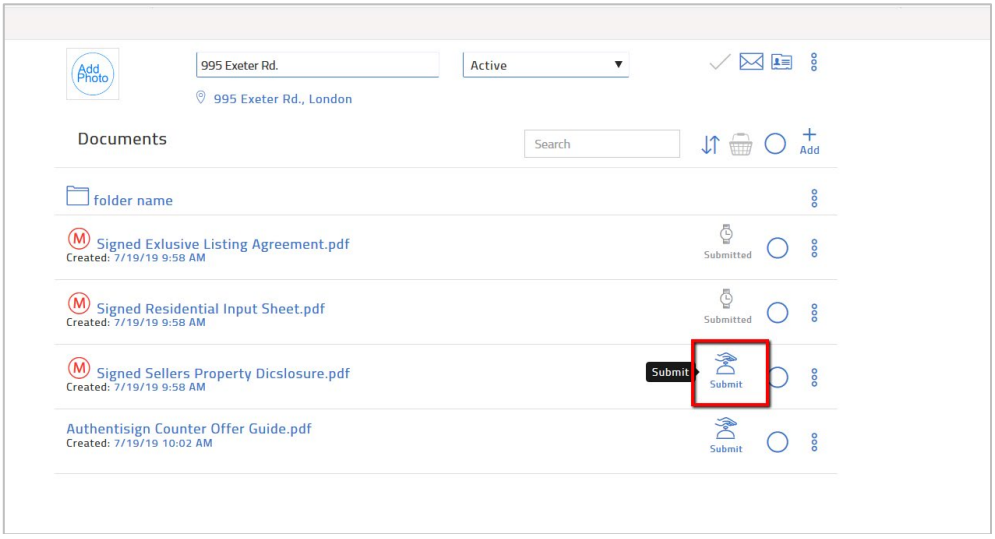


4. Ability to create and display 'Assign to Checklist Modal' for Submitting a document to a checklist item in a single step

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.




Lonewolf Technlogies, 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
Show completed tasks
Only track Mandatory Items in Progress Bar
No
Require Agents to Assign Documents to Checklist Items
Yes
Update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Created: 7/19/19 9:58 AM
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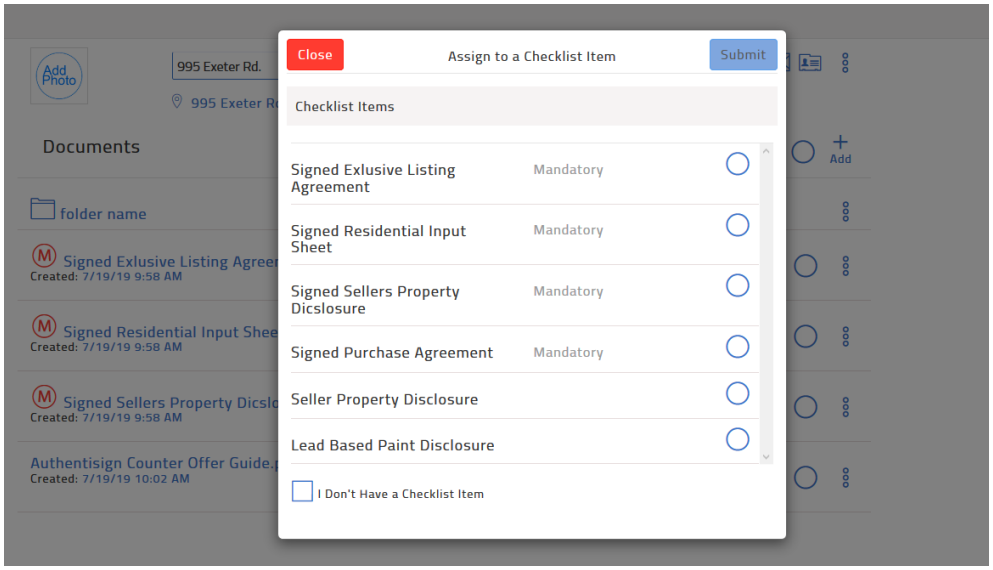
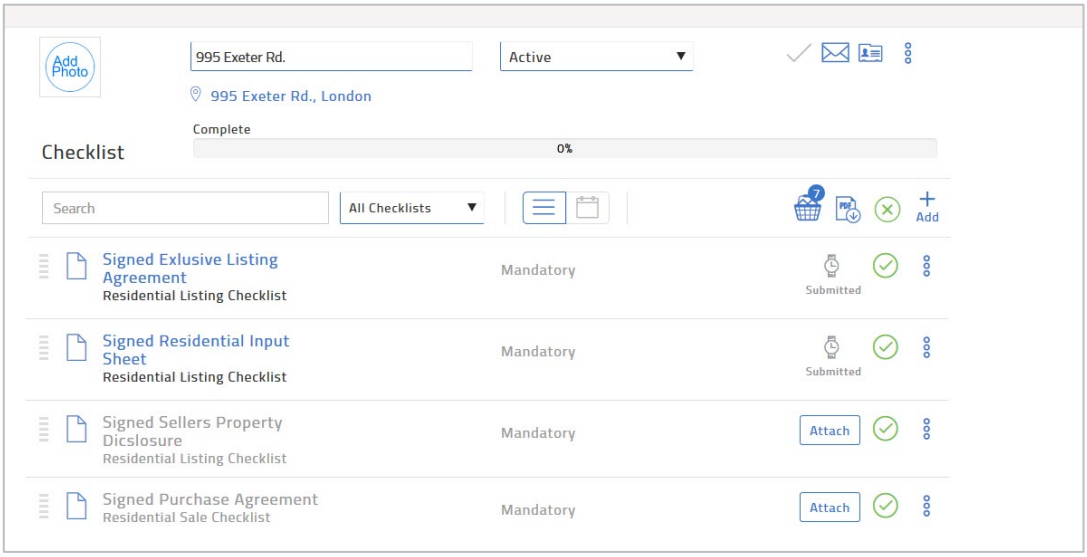
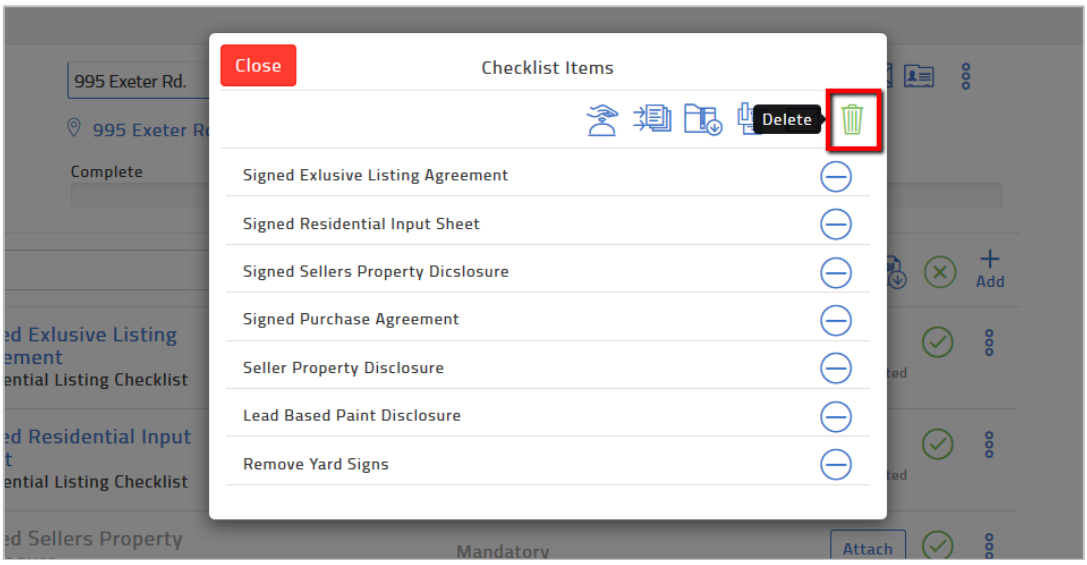


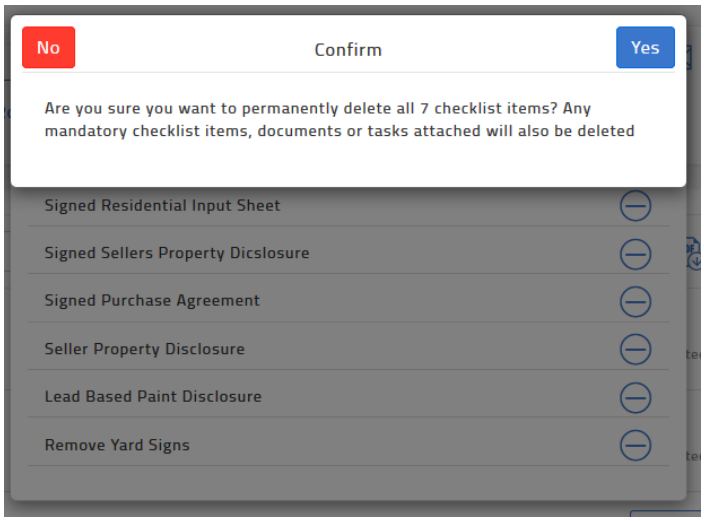
5. Added 'Delete' Option to the Bulk Actions for Checklists

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.



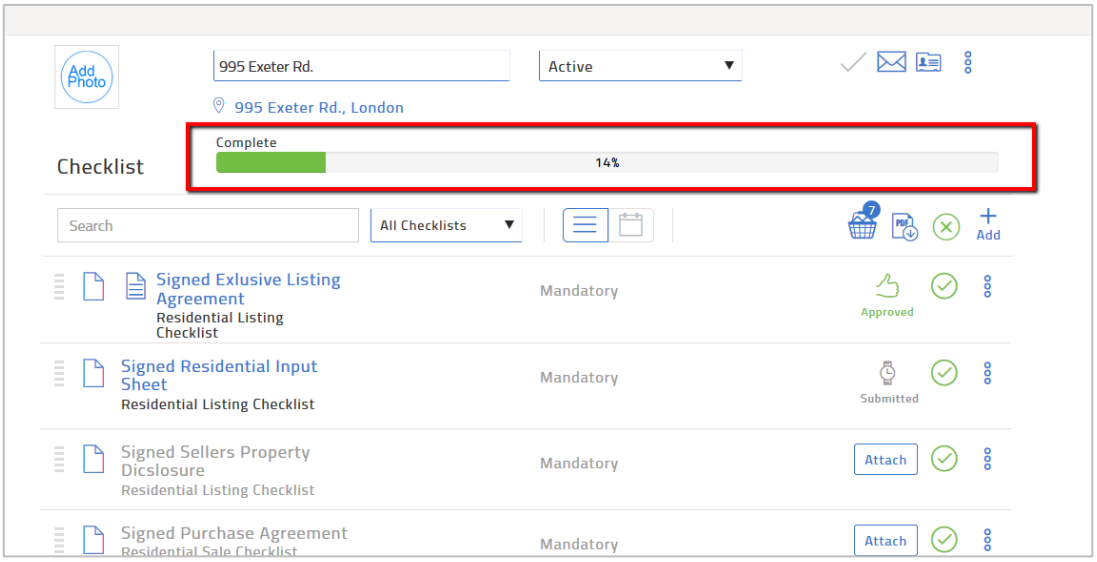


Note: *Only super users can delete mandatory checklist items.*



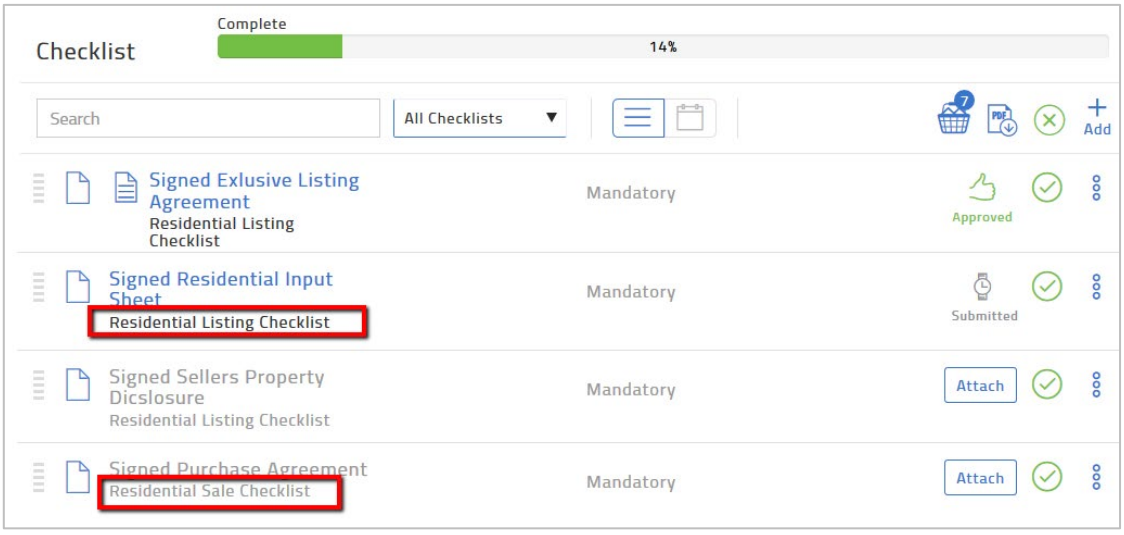
6. Updated location of the progress bar & checklist toolbar

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.



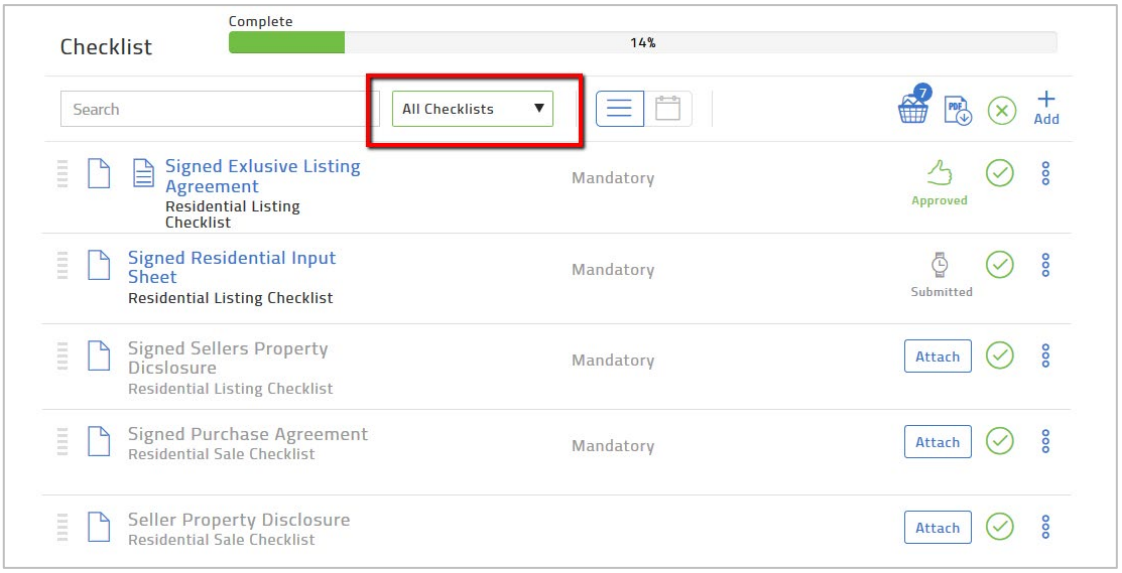
7. Introduced "parent" checklist name to individual checklist items

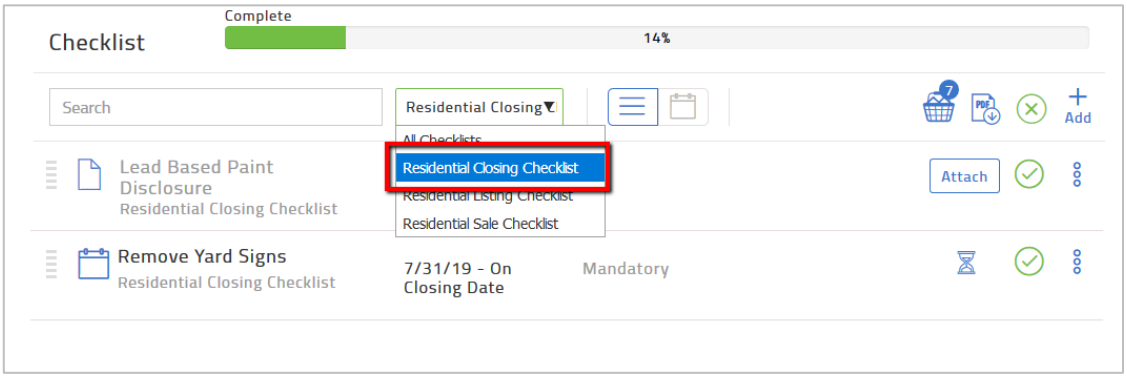
What is the Benefit? As any user, you can now see the name of the checklist on any transaction checklist items, ie. listing vs. pending vs. closed checklist, making it easier to see what tasks are due throughout each milestone of the deal.



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

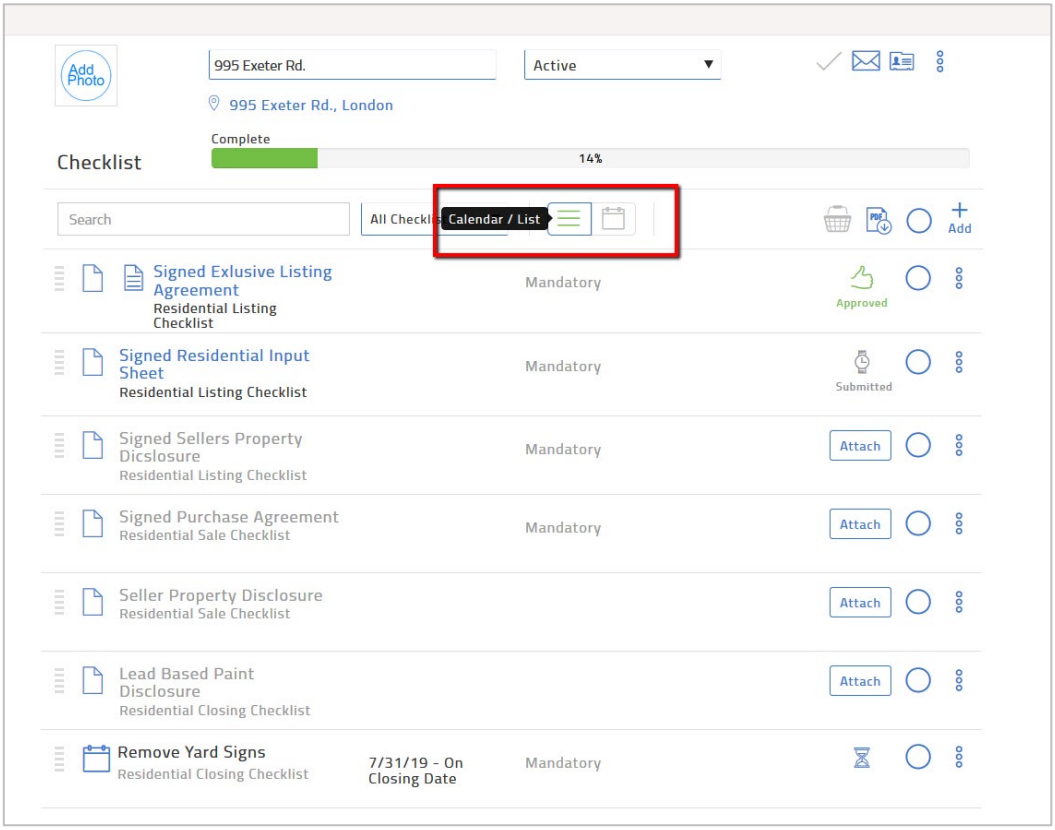
What is the Benefit? As an agent, you can now filter transaction checklist items by the checklist, ie. only items from your listing vs. pending vs. closed checklist.

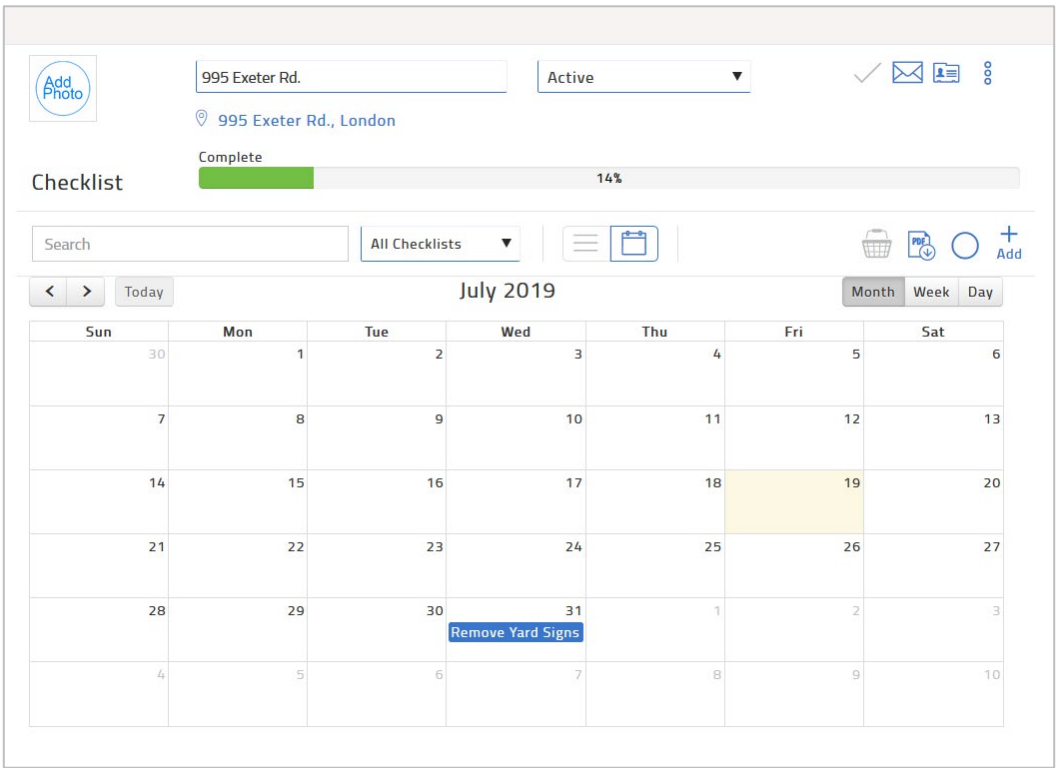




9. Converted List/Calendar view icons to a toggle switch

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.




Add Photo
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995 Exeter Rd., London
Complete
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Today
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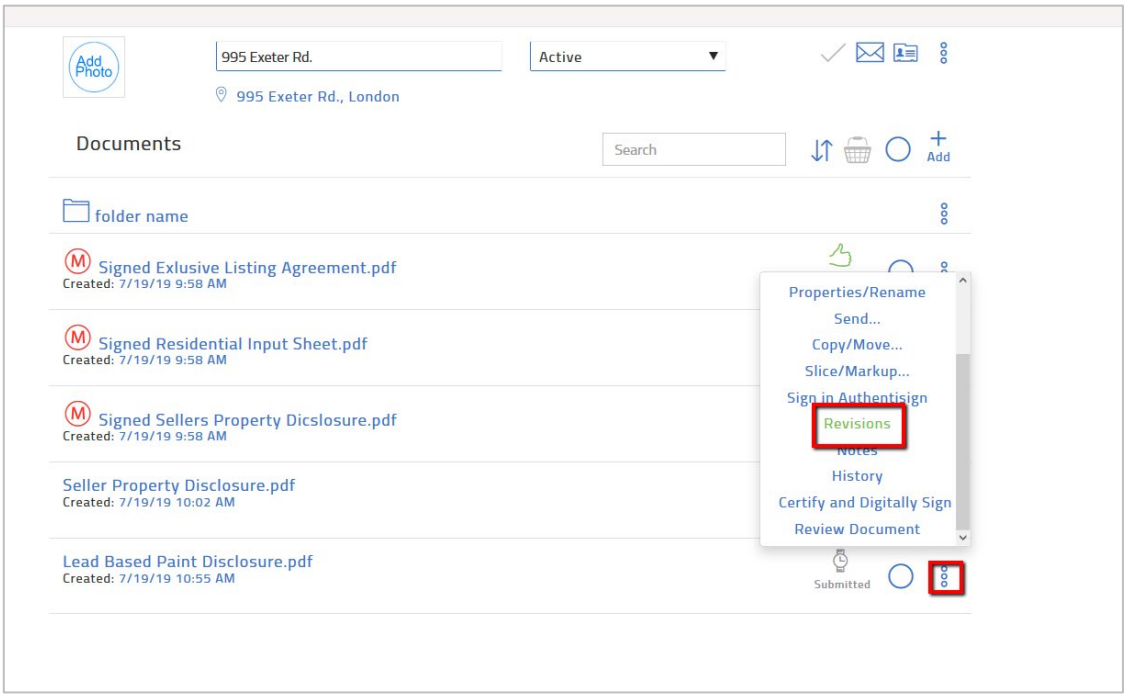
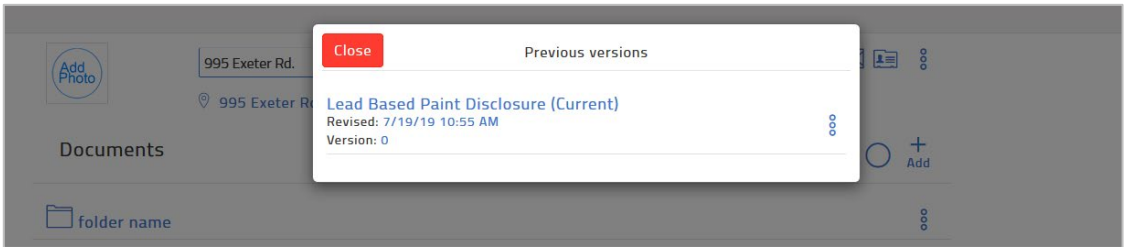
Remove Yard Signs

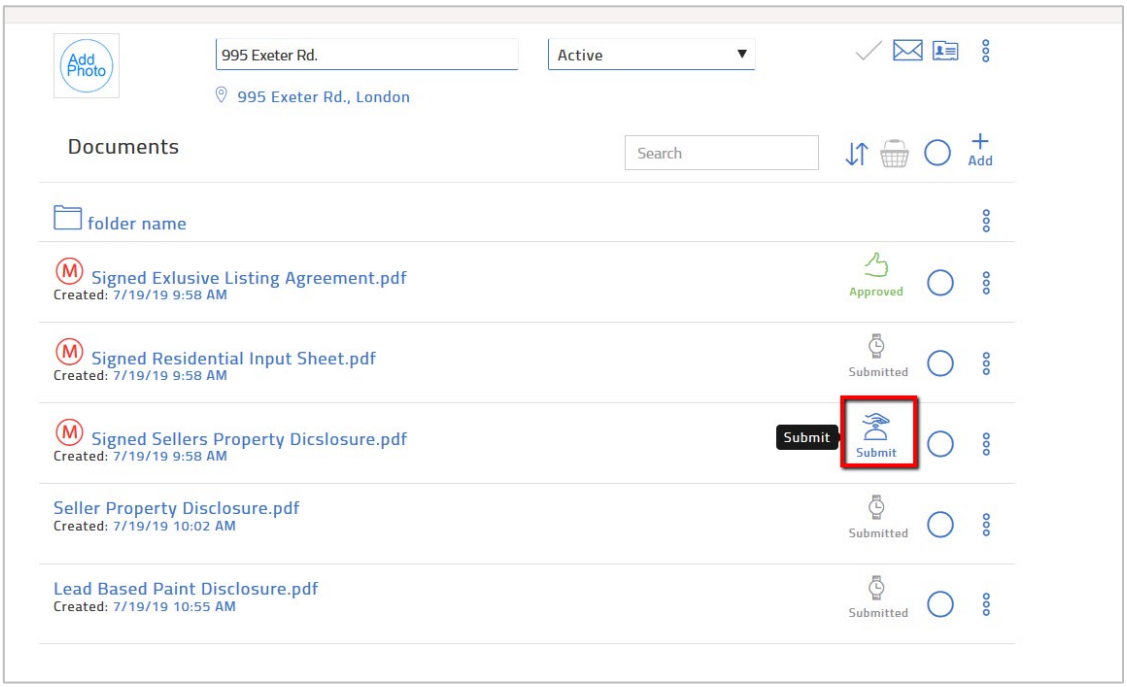
10. Added ability to assign Docs to checklists from the Assign to Checklist Item screen

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.



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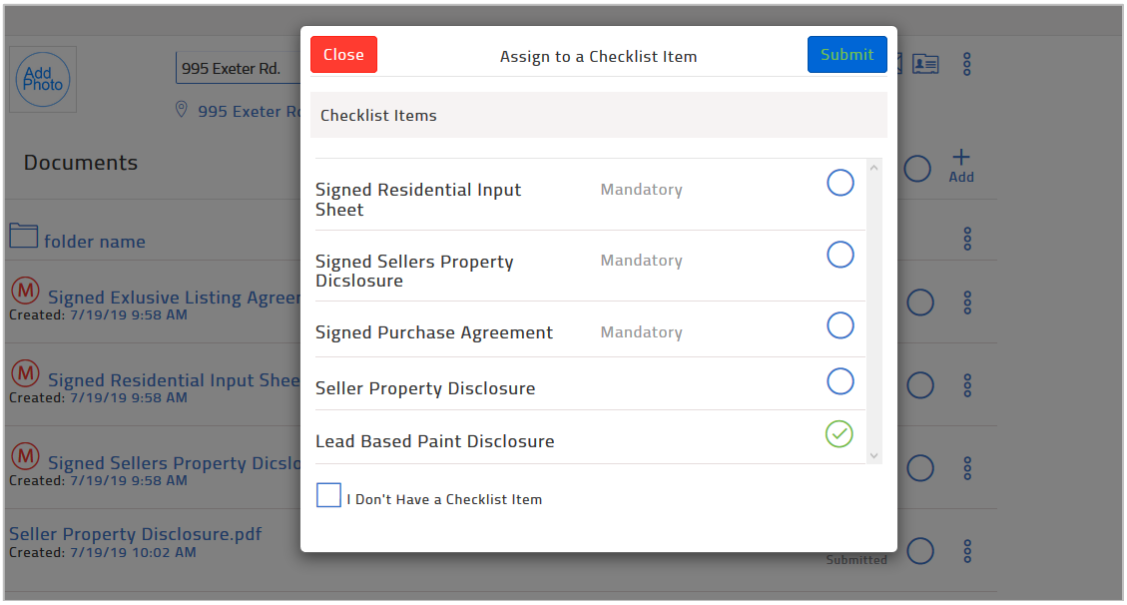
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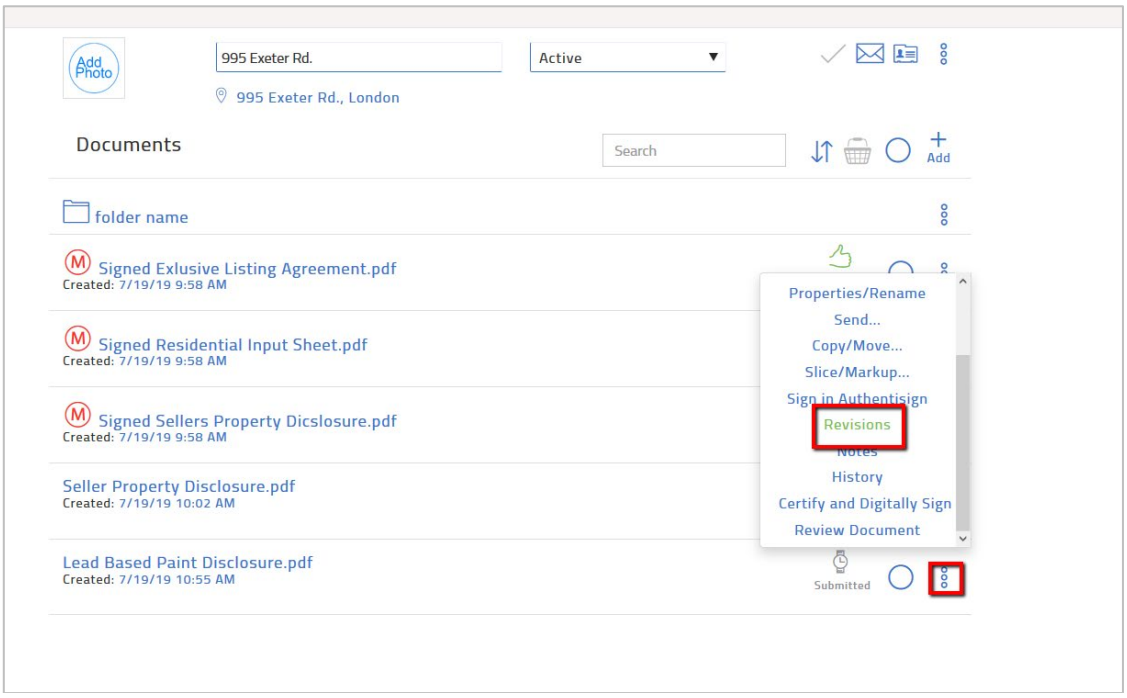
Seller Property Disclosure
Lead Based Paint Disclosure
I Don't Have a Checklist Item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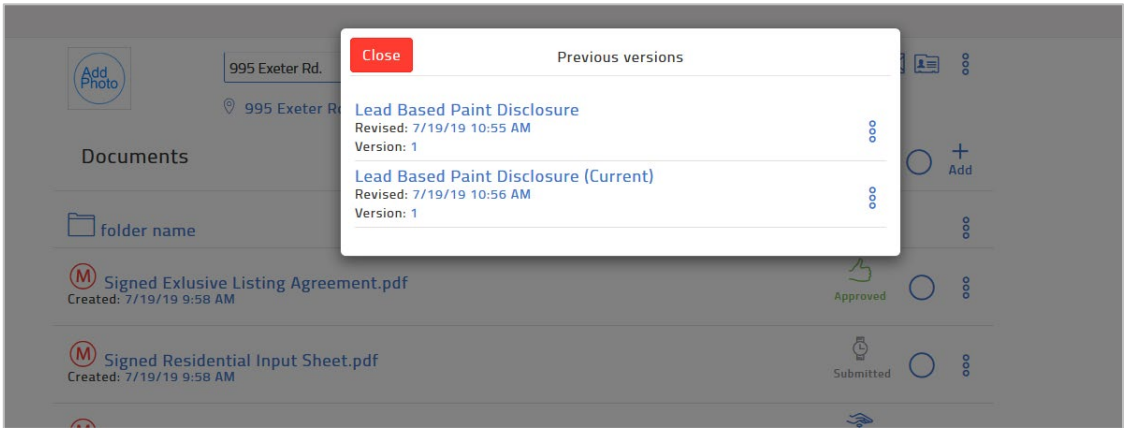
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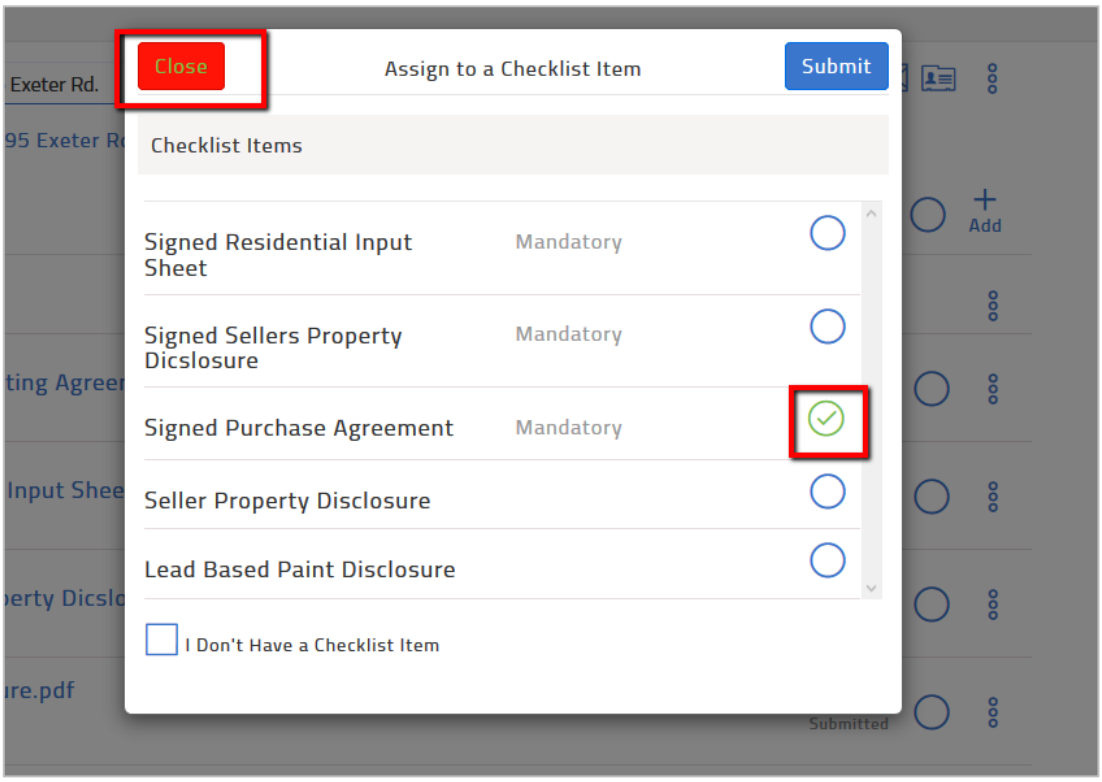
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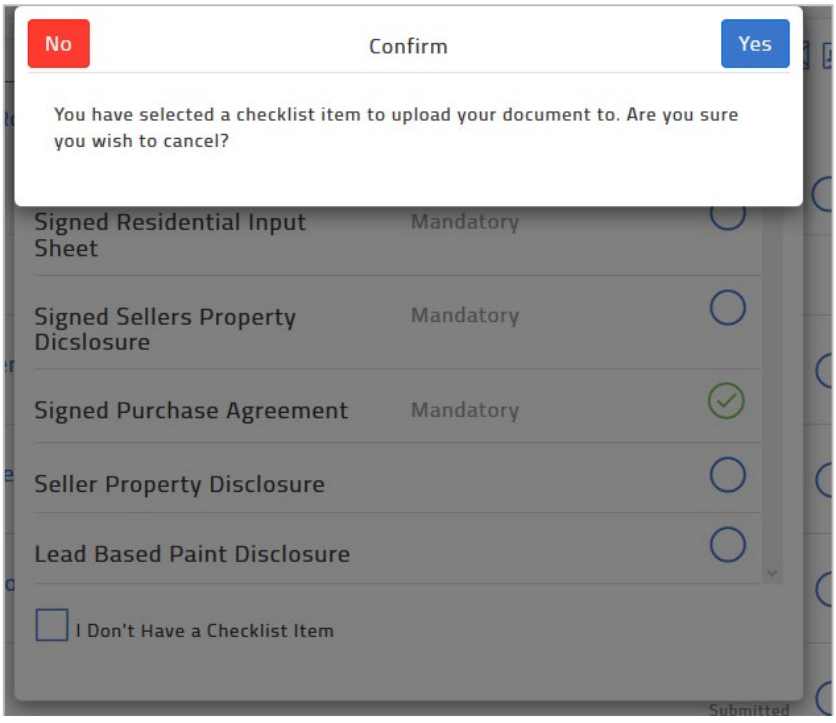
No
Confirm
Yes
You have selected a checklist item to upload your document to. Are you sure you wish to cancel?
Signed Residential Input Sheet
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Signed Sellers Property Dicslosure
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Signed Purchase Agreement
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Seller Property Disclosure
Lead Based Paint Disclosure
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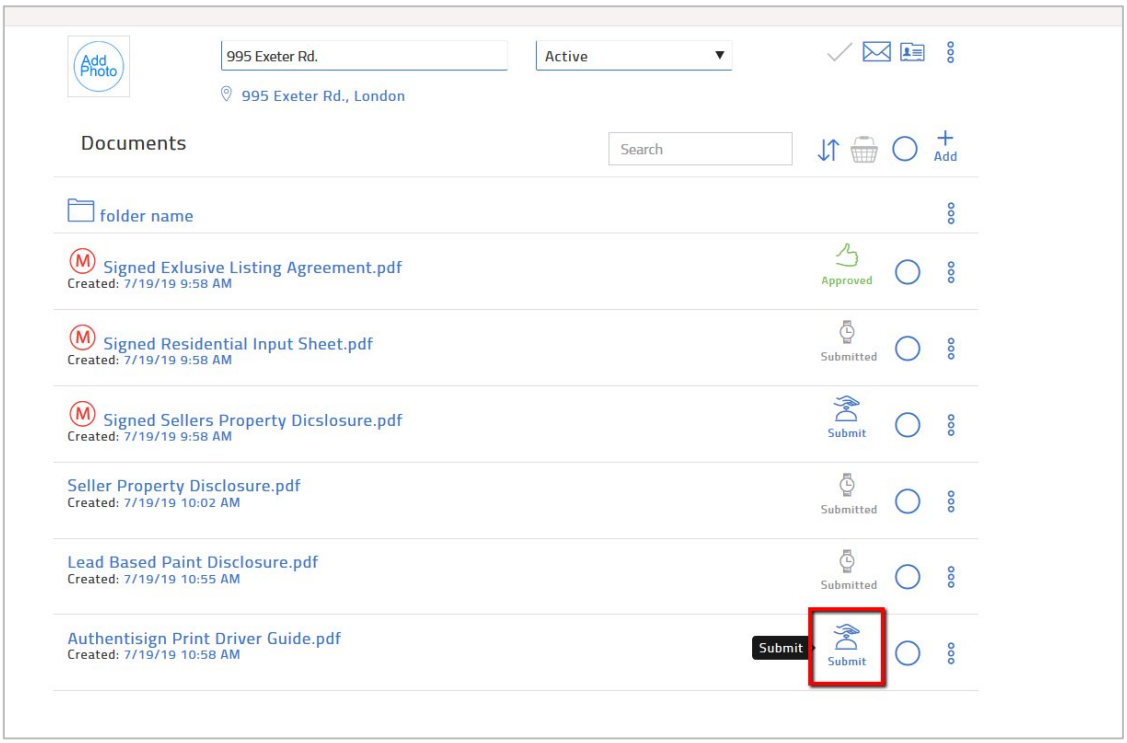
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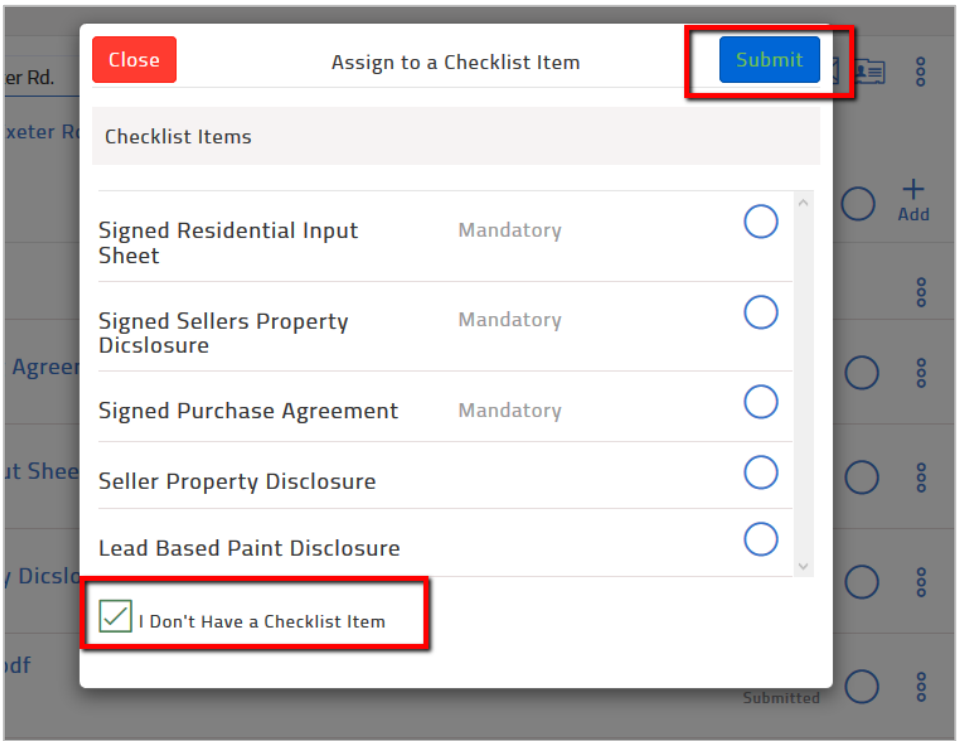
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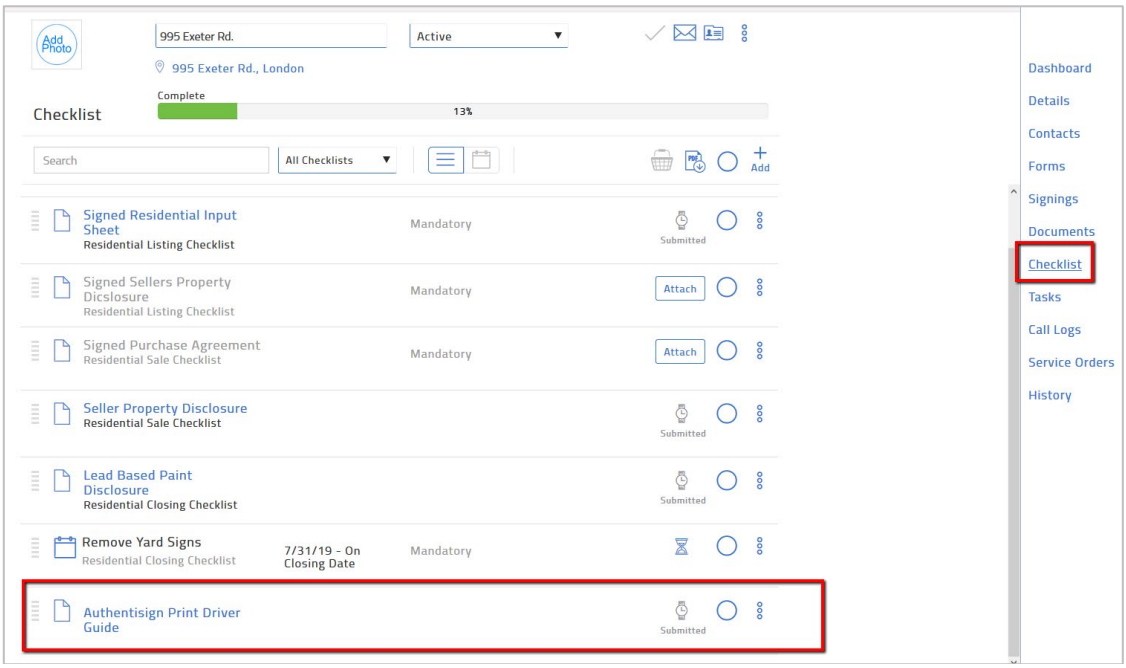
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Mandatory
Authentisign Print Driver Guide
Submitted
Dashboard
Details
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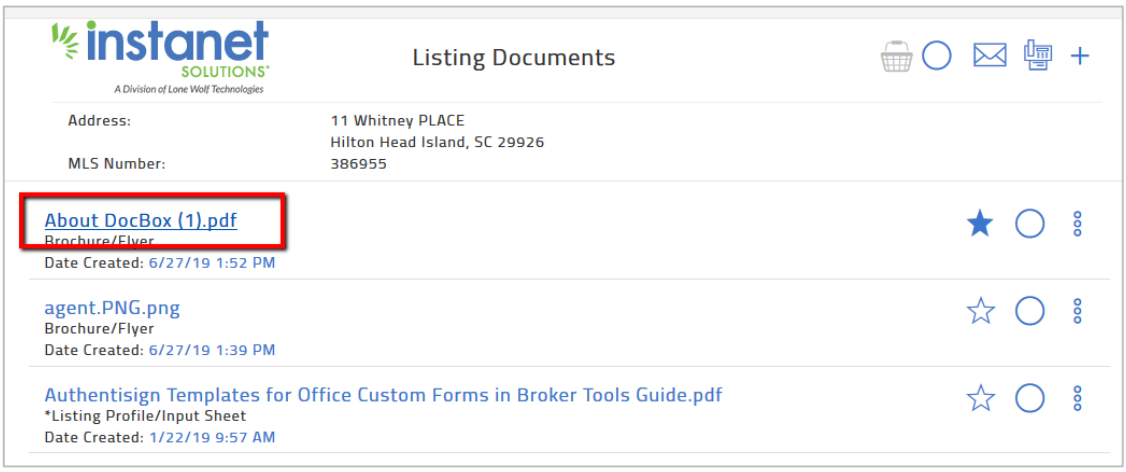
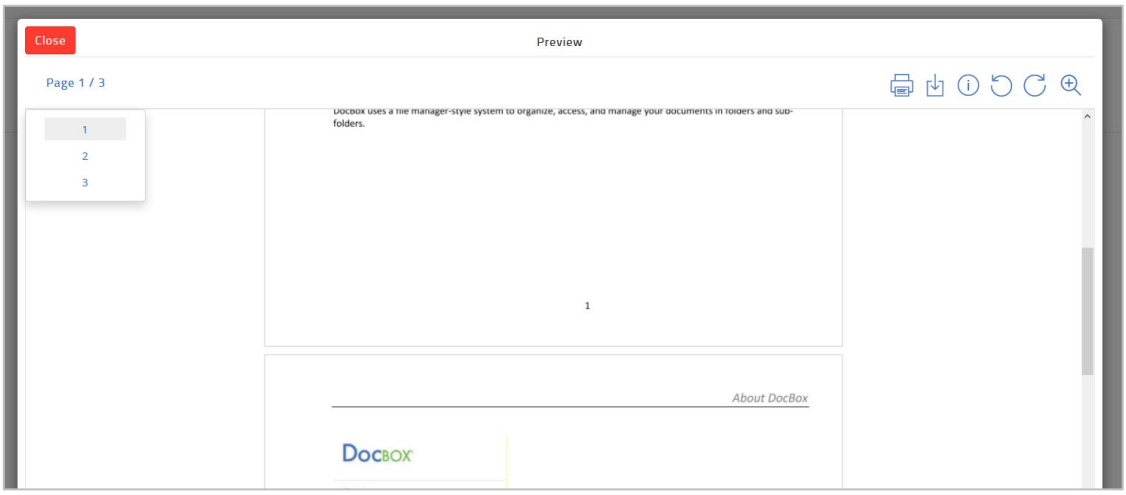
Call Logs
Service Orders
History

Other Notable Changes

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





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