

Usability Updates

Overview

An update to the TransactionDesk platform is due to be released that will simplify some of the day-to-day challenges experienced when managing paperless transactions.

Included in this document is a summary of the changes targeted for release on May 30, 2018.

Usability & User Interface Improvements

Easier navigation between transactions

When viewing a transaction, the transaction's title will now appear in browser tabs.

We've also reordered the browser title so **the page or section title will be easily viewable** on all pages.

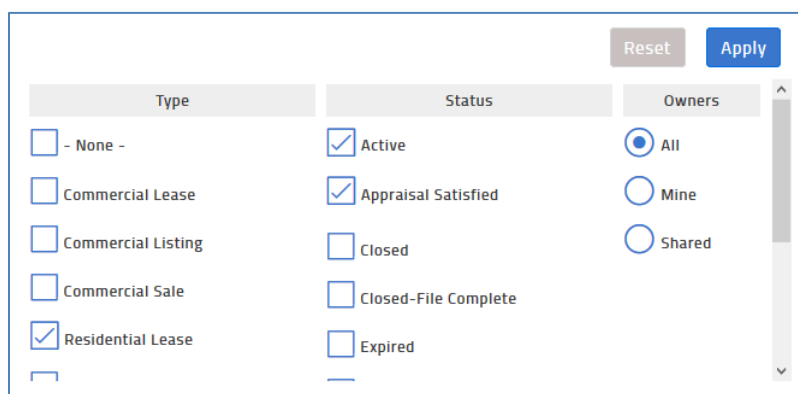


Improved search

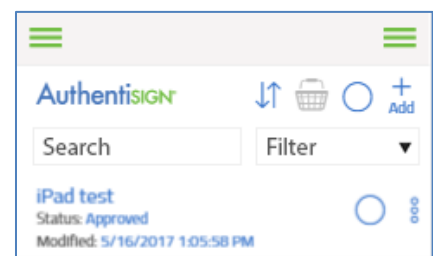
TransactionDesk will **remember the last used search and filter parameters** so you don't need to rebuild your search after clicking on a result.

A button will allow you to **easily reset to default search and filter parameters**.

Mobile search and filtering has been improved for agents using the TransactionDesk app.



Type	Status	Owners
<input type="checkbox"/> - None -	<input checked="" type="checkbox"/> Active	<input checked="" type="radio"/> All
<input type="checkbox"/> Commercial Lease	<input checked="" type="checkbox"/> Appraisal Satisfied	<input type="radio"/> Mine
<input type="checkbox"/> Commercial Listing	<input type="checkbox"/> Closed	<input type="radio"/> Shared
<input type="checkbox"/> Commercial Sale	<input type="checkbox"/> Closed-File Complete	
<input checked="" type="checkbox"/> Residential Lease	<input type="checkbox"/> Expired	
<input type="checkbox"/>		



AuthentisIGN

Search

Filter

iPad test
Status: Approved
Modified: 5/16/2017 1:05:58 PM

Broker Experience

Continuous Page Scrolling will be implemented for reviewing submitted documents. Brokers will no longer have to click between single pages to review a document.

PROJECT OVERVIEW

Key Milestones
Key milestones are a key project success. Any delay in the deliverables will impact these milestones.

DATE	LAUNCH DATE	DELIVERABLE DATES	RESPONSIBLE
10/19/2017	12/5/17	10/25/17	Instant Solutions
		Project Kick-Off Meeting	Client
		Forms Delivery with Requirements	Instant Solutions
		Property Page & Configuration	Joint Team
		Forms Programming QA / Testing	Joint Team
		Testing Plan & Set Up	Third Party
		Integrations	Joint Team
		Final QA & Testing	Client
		Acknowledge and Acceptance	

KEY MILESTONES
 (Start Today, Wednesday & Account Information)
 (BIO, One-Click Transactions, Test Data, Res. Request to TTS)
 (BIO) Using Capgemini

Note: List any additional milestones or documents attached (e.g. contracts etc.).

Contact Information & Roles
 Instant Solutions Project Team - @ 1.800.668.8768, option #4 then dial extensions as below:

ROLE	NAME	RESPONSIBILITY	CONTACT	EXT.
Vice President Sales	Steve Mapes	Initial Liaison between Client and Implementation Team	sm@instantolutions.com	839
VP Product Development	Joe Kassan	Directs Implementation Team throughout Implementation Lifecycle	joe@instantolutions.com	840
Account Manager	Dan Fortin	Direct Liaison between Client and Implementation Team	dfortin@instantolutions.com	828
Project Lead	Renee McMillan	Manages Implementation and Delivery of Project	rmc@instantolutions.com	831

A dedicated icon will make it **easy to switch between Broker and Agent views**.

Unlocking the dashboard will now show and hide the widget drawer.

Broker DASHBOARD Switch to Agent View

Transactions Create Transaction

Contact Get Started

Upload Document Upload

Email Email Documents

Reports Open Reports

Authentisign Start Signing

Overdue Tasks Empty - None Found Go to Tasks

Transactions - Last 30 days Go to Transactions

- 1234 Main Street
Modified:5/1/18 4:08 PM
By: Mr. mo broker
- 9005 Bethel Rd
Modified:4/27/18 12:27 PM
By: Mr. mo broker

Impersonate Agent Go to Agents

- Aakash Broker**
Office: InstantSolutions - GAR, 123 Main St.
Sometown GA 90210
- DanSuper FortinAccount**
Office: InstantSolutions - GAR, 123 Main St.
Sometown GA 90210
- Heyman Hoshyar**
Office: InstantSolutions - GAR, 123 Main St.
Sometown GA 90210
- Matt Simmons**
Office: InstantSolutions - GAR, 123 Main St.
Sometown GA 90210
- Max Ralph**

Deal Workflow Management


Transaction statuses will be more visible in the transaction header and can be **easily updated via a dropdown menu**.


The screenshot shows the TransactionDashboard interface. At the top, there's a header bar with a shopping cart icon and a menu icon. Below this, a transaction header displays a property image, the address "7250 COTTONWOOD KNOLL DR", a listing ID "LISTING #2189008642", and a location pin "7250 COTTONWOOD KNOWLL DR, WEST BLOOMFIELD". A dropdown menu is set to "Open". To the right are icons for checkmark, email, and a list. Below the header is the "TransactionDASHBOARD" title. The main area contains four panels: "Detail Overview" (showing address and listing details), "Forms" (empty), "Documents" (empty), and "Checklist items status" (empty). Each panel has a "Go to" link at the bottom.


Transaction statuses will be **more visible when viewing the transaction list**.


TransactionDESK


Search




















4450 Twiggs Dr
Residential Listing, Active
Modified: 5/1/18 3:37 PM

Complete

23%










5534 Elm Street
Residential Listing, Active
Modified: 5/1/18 2:42 PM

Complete

54%










9430 Vista View Dr
- None -, Active
Modified: 4/26/18 9:22 AM

Complete

80%










7708 Main Street
Residential Listing, Active
Modified: 4/25/18 11:40 AM

Complete

93%









1199 Sunnyside St
Residential Sale, Active
Modified: 4/18/18 1:11 PM

Complete

13%





Bug Fixes

- Fixed browser behavior when using the back button while browsing DocBox and Forms file directories
 - Fixed inconsistencies in the placement of sort and filter icons while viewing lists of transactions, contacts, tasks, and service orders
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Contact

lwolf.com

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