Transaction Desk

Transaction Desk provides an icon located on all listings in Paragon that allows you to quickly create a "sale" transaction and auto-fill forms with the listing's information. By simply clicking the icon and following the step-by-step wizard in Transaction Desk, you will be able to select, auto-fill, and complete forms; store transaction documents; upload additional documents to your transaction; and email or send the sale transaction for a paperless signing with Authentisign.

STEP 1:   Create a Sale Transaction

1. Click the icon from any Paragon listing.

2. Transaction Desk will automatically create a new transaction and auto-fill the listing data.

   Tip: The transaction will be named using the property address. You can rename your transaction at the top of the Property Detail page.
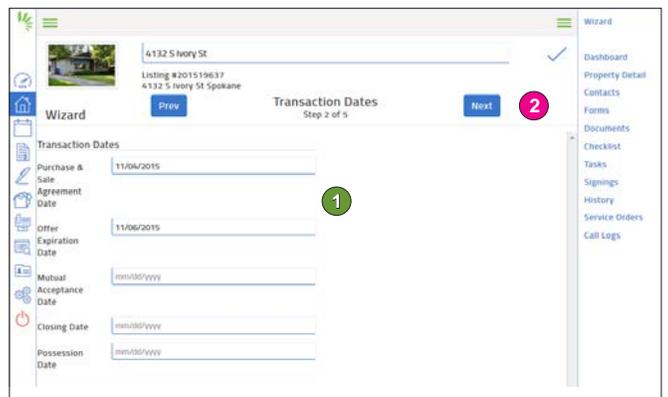
3. Complete the Details Tab

   1 Review the property information section and fill in the purchase price.

   2 Click "Next" to continue.
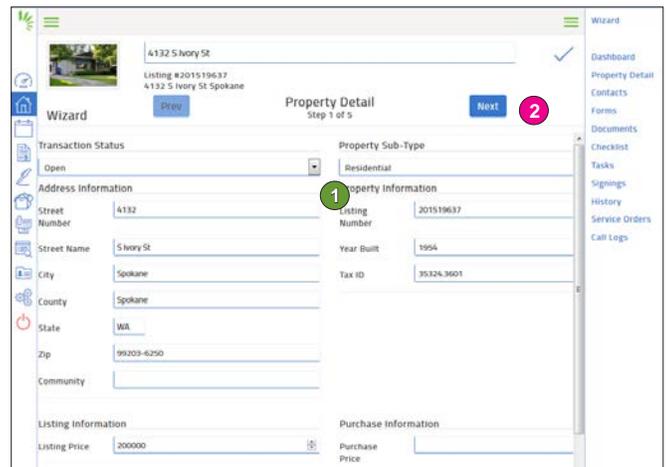
4. Add Transaction Dates

   1 Fill in any applicable dates that you would like to auto-fill into the listing forms. You can also fill in the dates later, or enter them directly into the forms.

   2 Click "Next" to continue

STEP 1: Create a Sale Transaction (cont.)

5.   Add, Edit, and Delete Contacts

To Add a Contact:

1   Select "Add New" and choose "Create New" to add a new contact or "Add Existing" to choose from your existing contacts.

2 Add your buyer as a contact to auto-fill their contact information into the transaction forms
- Choose "Buyer" as the contact type
- Enter their name as you would like it to appear on forms
- Enter their email address
- Keep "Add to Address Book" checked to save to your Contacts
- Click "Save"

Add the seller as a contact to auto-fill their contact information into the transaction forms
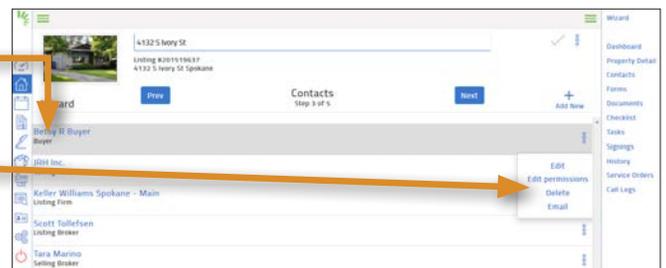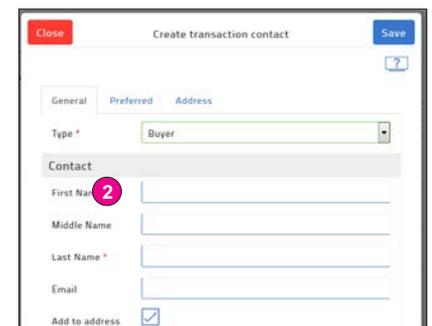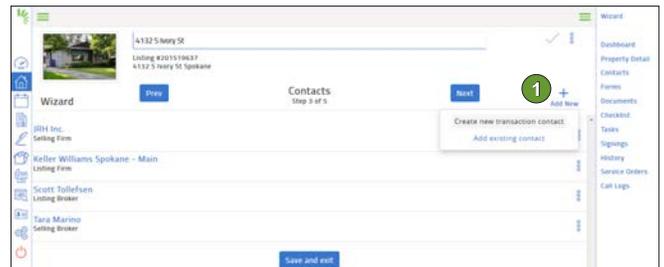- Choose "Seller" as the contact type
- Enter their name as you would like it to appear on forms
- Click "Save"

To Edit or Delete a Contact:
Click the contact's name, edit the information and click "Save" to return to the Transaction or;

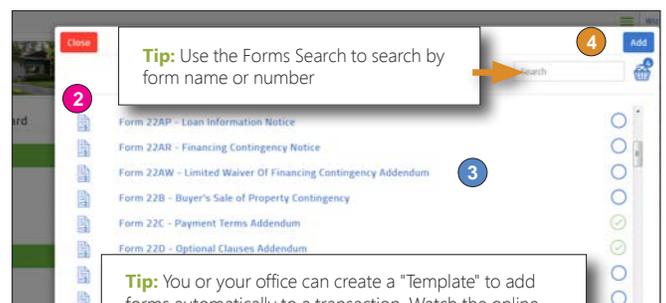Select the circle menu to the right of the contact's name and choose "Delete"

3 Click "Next" after adding, editing or deleting contacts to continue

6.   Add and Fill-in Forms

Add Forms:

1   Select "Add New"

2   Click on a folder to expand the selection

3   Select your forms. You can press and hold the CTRL key while clicking to select multiple forms

4   Click "Add"

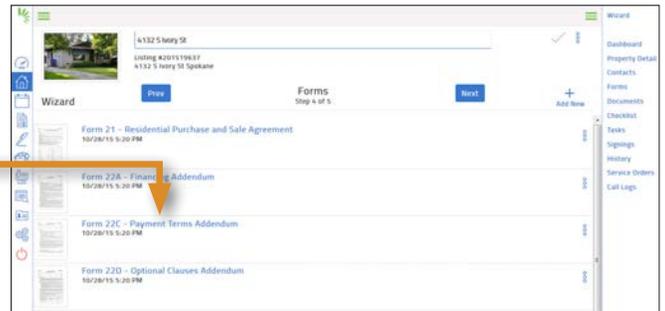**Tip:** Use the Forms Search to search by form name or number

Tip: You or your office can create a "Template" to add forms automatically to a transaction. Watch the online video to learn how!

STEP 1: Create a Sale Transaction (cont.)

6. Add and Fill-in Forms (cont.)

Fill-in Forms:

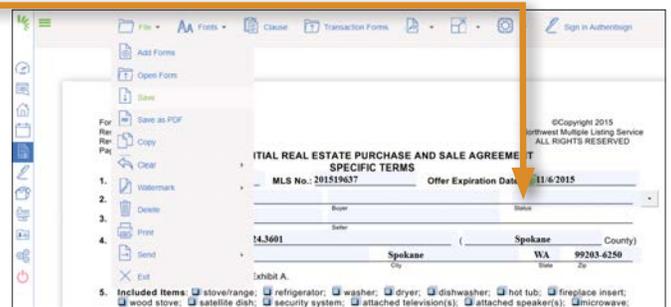- Click on the Form Name to open the Forms Editor.

- Type in the missing information to complete the form.

    IMPORTANT:
    If you enter or change information that is found on other forms, the entry or change will automatically populate into all forms throughout the transaction. For example, if you edit the property address, it will be edited on all forms.

- Save your changes by going to the File menu and choosing "Save". If you want to save the form to your computer rather than saving in Transaction Desk, choose "Save as PDF".

- Continue to the next form

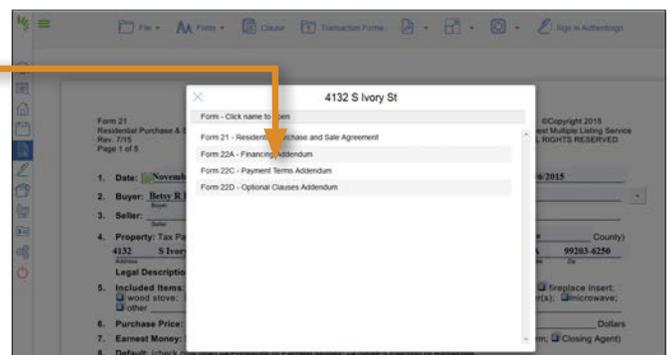   - Click on the Transactions Forms button in the middle of navigation bar

    - A pop-up window will appear

    - Click on the next form to open the form in the editor

- Once you have completed filling in all forms in the transaction, go to the File menu and choose "Exit" to return to the Transaction Details page
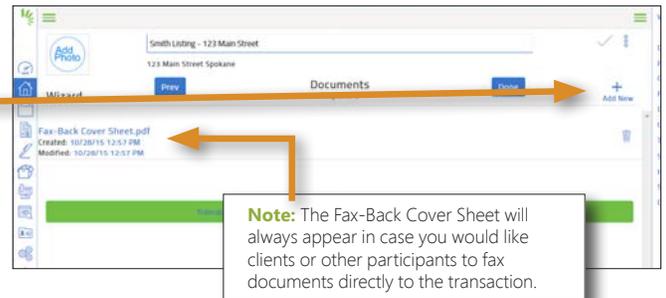
- Click "Next" to continue

STEP 1: Create a Sale Transaction (cont.)

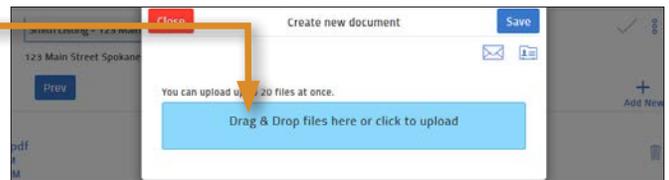7. Upload Documents To Your Transaction

You can upload additional documents, signed forms, or disclosures that you would like to store online or include in an electronic signing.

To Upload Documents:

- Click on "Add New"

> **Note:** The Fax-Back Cover Sheet will always appear in case you would like clients or other participants to fax documents directly to the transaction.

- Click on the Blue Box to access your files.

- Double click on a file to upload it into your transaction.

To Upload a Document via Email:

- Click "Add New", and then click the Envelope icon

- Copy your transaction email address. This address is specific for your transaction. Anything you send to that email address will automatically upload into the documents section.

  1. Copy the email address
  2. Open your email account
  3. Click forward on the email you would like to upload
  4. Paste in the Transaction Desk email address. The email chain and any attachments will be uploaded into the Documents tab of the transaction.
  5. Send the email
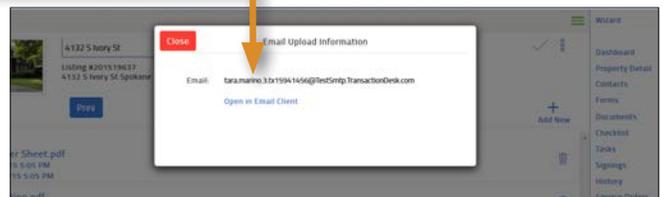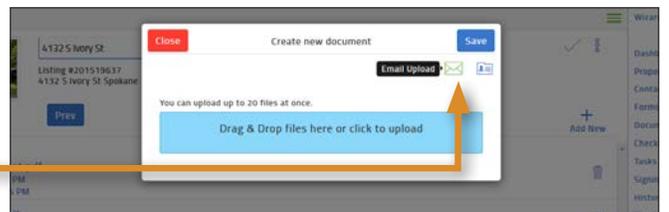
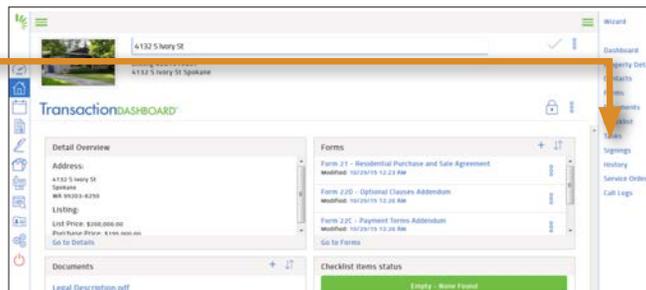- Click "Done" to exit the wizard and go to the Transaction Dashboard

STEP 2: Send Using Authentisign or Print, Email, or Fax
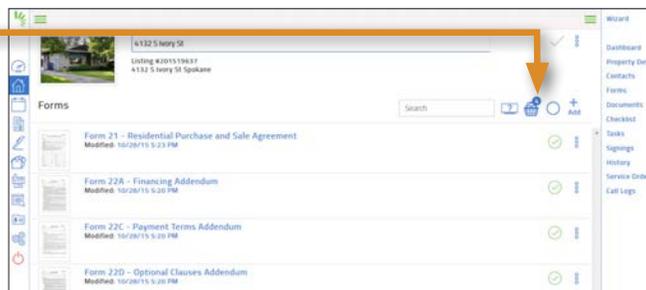
To Access Authentisign:

- Click "Signings" in the transaction menu

    Note: Please see the Authentisign user guides for details on creating and sending electronic signings.

To Print, Email or Fax:

- Click "Forms" or "Documents" in the transaction menu

- Select the forms or documents, and click on the Basket icon to email, print or fax

Your entire transaction, including forms, documents, contacts, and change history will be saved in Transaction Desk.