TransactionDesk Release



lwolf.com 1.866.CRY.WOLF(279.9653) 1. Ability to enable or disable new email notifications to SuperUsers when notes are added to a document, allowing users to stay up-to-date on the status of a transaction at all times.

Super User
Super User – New Note Added to a Document
Super User - New User Login
Super User - Notify Deleted Transaction
Super User - Notify Deleted Transaction Document
Super User - Transaction Status Change
Super User - Transaction Status Change [Active]
Super User - Transaction Status Change [Closed-File Complete]
Super User - Transaction Status Change [Closed]
Super User - Transaction Status Change [Expired]
Super User - Transaction Status Change [Open]
Super User - Transaction Status Change [Pending]
Super User - Transaction Status Change [Withdrawn]
Save

2. **Updated Checklist Progress Bar** to only calculate based on mandatory items, allowing broker owners to specify whether transaction progress is based on all items or only mandatory items. Ultimately, this will allow brokers to monitor deal progress across their brokerage according to their specific work workflow.

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	(Office Settings		Office Transactions
		Sunset Realtors of Ontario, 155 Sunn Allow Agents to Delete Transactions Show Vendors to Participants Force Agents to use Templates Task Reminders for: Only track Mandatory Items in Progress Bar	vville Lane Austin AL 00000 No Vos Vos No	Office Tasks Agents Reports Office Settings Authentisign Templates Canned Notes
1		Warner Real Estate, 35 Heber St. Tree	ton ON	
?		Allow Agents to Delete Transactions Show Vendors to Participants	Yes V No V	
Q		Force Agents to use Templates	No	
		Task Reminders for:	None	
		Only track Mandatory Items in Progress Bar	No Y	



3. Added ability to select "All Offices" in the Broker File Review office drop down. This enhancement will allow staff members to view all tasks that they are responsible for across all offices in one screen – saving time and reducing risk of missed documents.

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	Broker File Review	Search 🕼 🖶 🖓	Office Transactions
3	T (All Offices	Office Tasks
2	U 19	All Offices	Agents
2	🚫 Reg Apr29 Mr. Danny Restrepo III 🕦		Reports
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4. **Created the ability to upload a new version of a document from the thumbs down icon**. Agents will now have the ability to upload a new version of a document for review from the same place they review notes. This will save agents time and reduce chance of uploading revisions to the incorrect location.

14	=		定 🚍 Wizard
		Reg. Apr.29 Open	Dashboard Details Contacts
		Fax-Back Cover Sheet.pdf 8 E Task1.pdf Image: Created 6/20/19 11:34 AM	* Forms Signings Documents Checklist
		Item X.pdf Created: 6/20/19 11:34 AM Item Z.pdf Created: 5/20/19 11:34 AM Item Z.pdf Sdmitted Item Z.pdf	Tasks Call Logs Service Orders History
		Reg Apr29 Close Notes Listing #8314387 Upload a revision 1 2 1 0 7522 St David 1 1 1	Add
	Documents	Mr. Danny Restrepo III on 6/20/19 11:40 AM	- Add
Fax-Back Cover 9 Created: 4/29/19 10		neet.pdf 19 AM	0 0
	Task1.pdf Created: 6/20/19 11:3	14 AM Rej	Reported



5. Updates to Notes Modal

In order to streamline the note process and save time, users will now have the option to select *Add Another Note* and leave several notes at a time without leaving the notes screen.

	₽ ≡	Wizard
Reg Apr29 Close Notes Save		
Listing #8314387 © 7522 St Davids You must provide a note, reasoning the action you wish to take on this document.		Dashboa
Minimum of 10 characters and a maximum of 500.		Details
Documents Select as many canned notes as you like, to pre-populate your note.		Contact
Canned Notes - Select as many as required -	-	Forms
Fax-Back Cover Sheet.pdf Created: 4/29/19 10:09 AM Note Adding Monach		Signings
Adding a New note		Docume
		Checklis
Item X.pdf Greated: 6/20/19 11:34 AM Add to Canned		Tasks
Notes		Call Log
Item Z.pdf Created: 6/20/19 11:34 AM		Service
		History

6. Light UX changes including new and updated icon placement, improved calls to action to increase agent adoption.

A STOTA	Reg Apr29	Open 🔻	V 🖂 🗈 🕴
	Listing #8314387 7522 St David St, Fairburn		
Checklist		Search	
Task1	Anytime		Rejected
Task3	Anytime		Attach
Task1	Anytime		Attach
Task2	Anytime		Attach
Task3	Anytime		Attach
Item X	Anytime		Approved
Item Y	2/28/18 - On Closing Date		Attach
Item Z	On Expiration Date		Submitted

