

TransactionDESK®

App

June 13th , 2017

Using the Help Sections and Activating the App

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Using the help sections and Activating the App

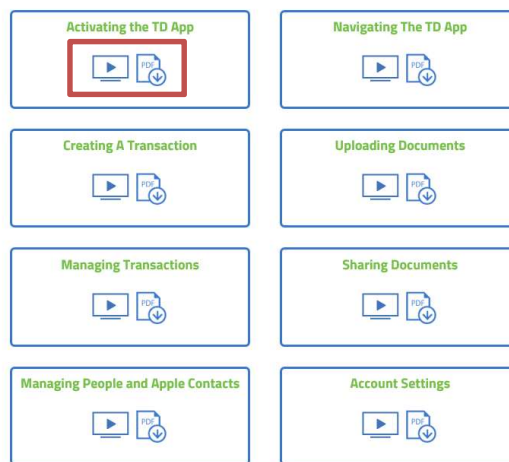
You can now download and activate our App on to your mobile device. Below is an overview of how to use the help sections and how to activate and login to the App.

To get started you can check out all the videos and PDF guides that are publicly available to anyone located here: <http://www.instanetsolutions.com/tdapp/>

Just click either the video link or the PDF button to open whatever format of the help topic that you prefer.

TransactionDesk App Help and Support

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To get a brief description of the different features of the App you can navigate to this link: <http://www.instanetsolutions.com/products/tdapp/>

This will give you a an idea of what is new and usable in our new App.



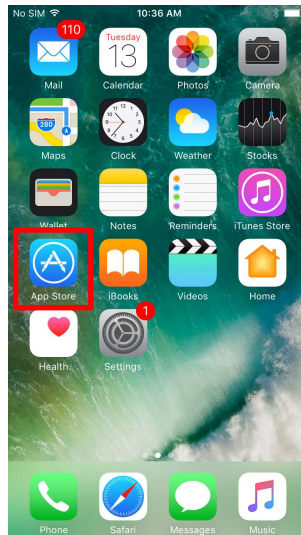
Additional TransactionDesk® App features:

The TransactionDesk® App not only has All of the functionality available in the browser version of TransactionDesk it also allows extra capabilities such as:

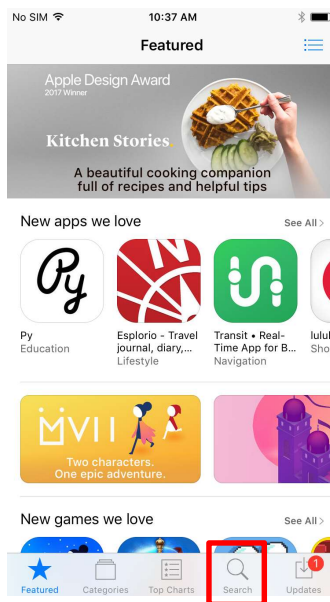
- **Access Local Documents:** Access and Upload any document from your phone or tablet into your secure cloud storage in TransactionDesk.
- **Use Apple Contacts:** Access and use all of your Apple contacts in your trasnactions
- **Send iOS® Push Notifications:** Automatically Receive and Send Transaction Status Alerts and Reminders using your iPhone® or iPad®.

The rest of this document shows you how to download, activate and login to the App. Then Finally how to use the help section while in the App.

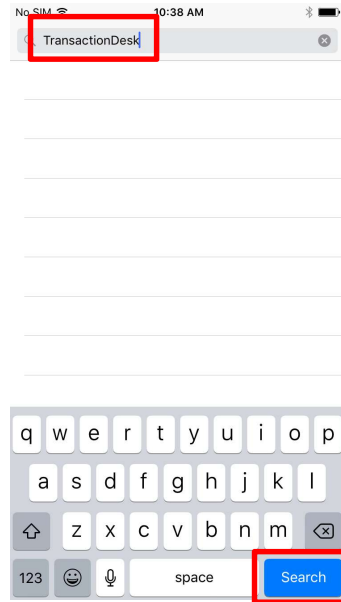
- To get started turn your mobile device on and nagivate to the apple store.



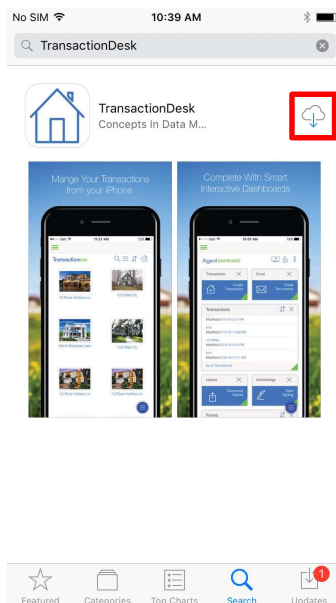
- Once in the store hit the search button.



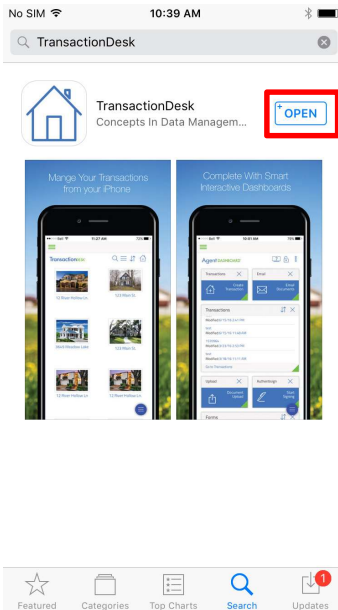
- Now type in TransactionDesk and hit search.



- You should see the TransactionDesk App come up as your result. Just hit the cloud icon to start your download.



- Once it is finished the download you can now hit the “Open” button to open the App. It will also now be in your list of applications on your mobile device.

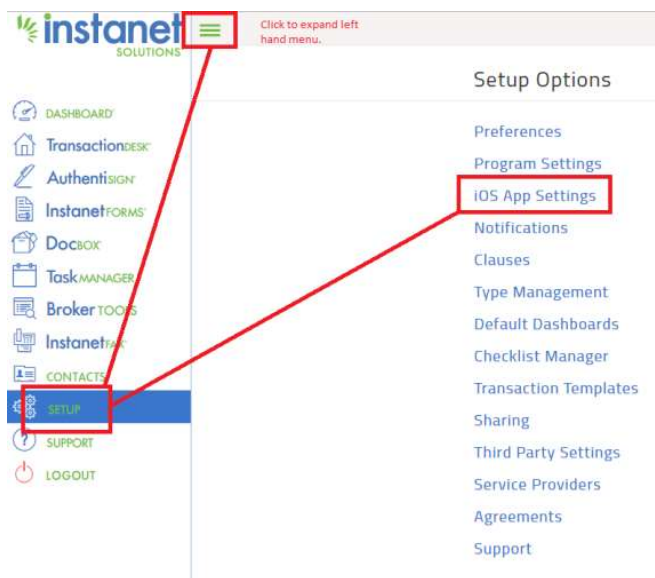


This rest of this guide will show you how to login to the App and how to access the help section while in the app. It starts on the next page down.

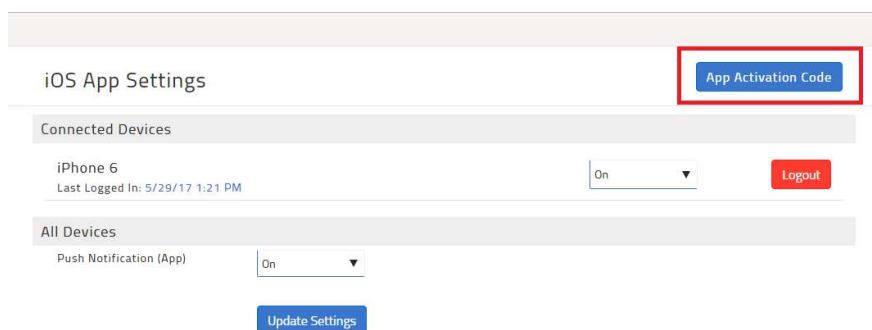
Now that you have successfully downloaded and installed the APP you will now need to login to it. There are two ways to login to the app which is listed below.

The first way to login to the app is to use the activation code which can be generated in your account under the setup menu section and navigating to the App settings section.

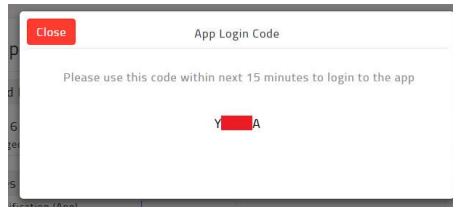
- To get started, login to your TransactionDesk account as you normally would on your PC or mobile browser. Now navigate to setup on the left hand side (you can click the green hamburger button in the top left hand corner to expand the menu if needed). Next click “App settings”.



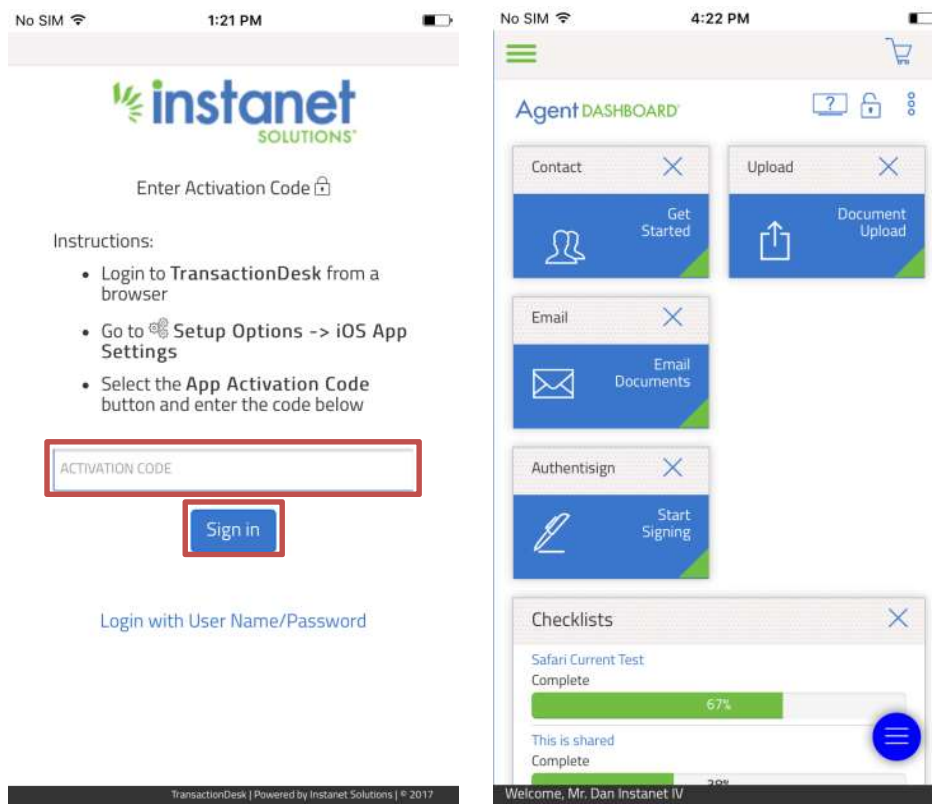
- Once in this section you are presented with a few different options. Go ahead and hit the “App Activation Code” button in the top right hand corner.



- You will now have a pop up window presented to you with an alphanumeric code. You only have 15 minutes to enter this into your app login page for security purposes. Copy the code down or keep the screen up on your PC.



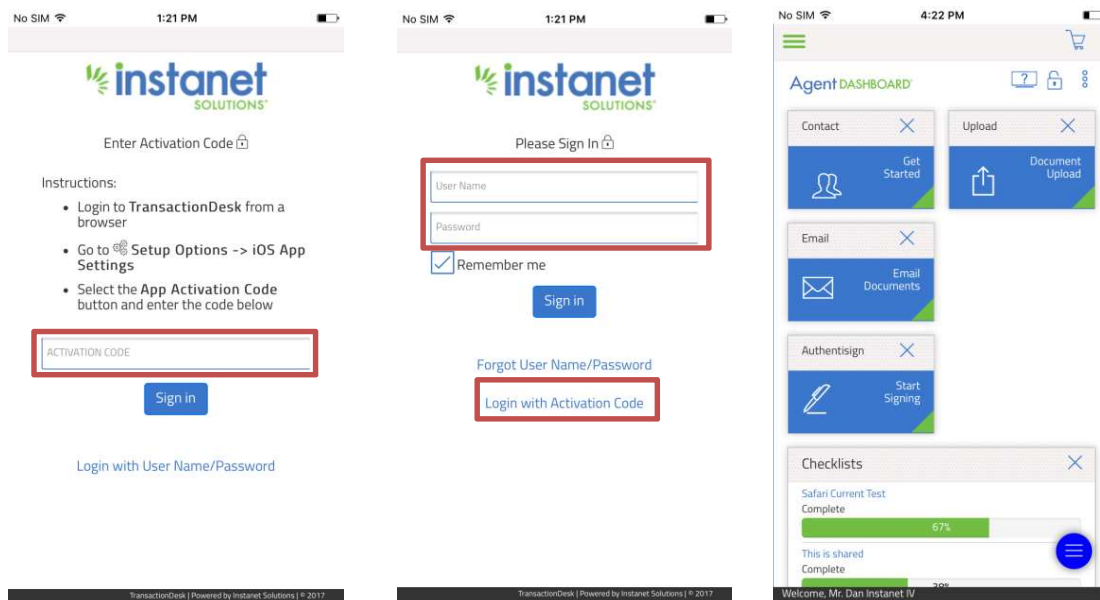
- Next go ahead and open the APP on your phone or tablet and on the login page enter the code that you copied down from the step above in the “Activation Code” field box. (The login page also has similar instructions on how to obtain your Activation code.)
- Now hit Sign-In and it will log you into your account and start you in the Agent Dashboard screen.



Scroll to next page for second method of logging in.

The second method of logging into the App is with your Username and Password if you know it. If this is the case, then open the App on your mobile device.

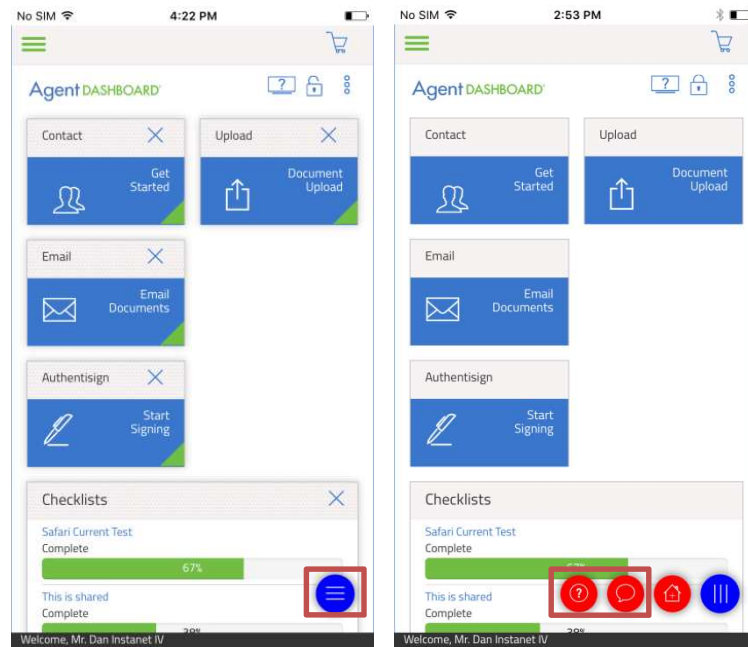
- This time hit the link near the bottom that says “Login with User Name/Password”.
- Once you hit that link you will see screenshot 2. Go ahead and put your username and password in and hit “Sign in”, it will now log you into your account and start you in the Agent Dashboard Screen.
- As you can see, if you do click this link, you can switch back to the previous login screen by clicking “Login with Activation Code” to get back to the original login screen and then proceed to follow the first login method in the beginning of this document.



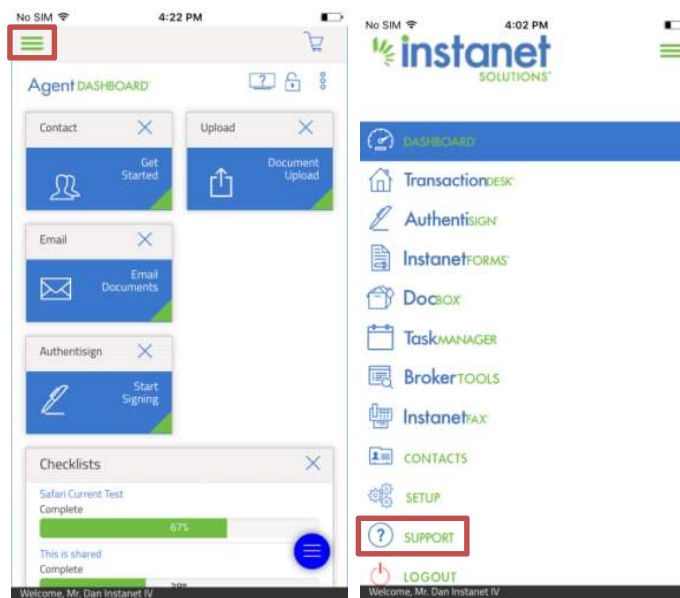
Once you are logged in now you can access the internal help section as well. Scroll to the next page to see how you can do that.

You can access the support section in two ways which are listed below.

- First way to access the support section is to hit the blue orb icon on the right hand side of the screen and then the question mark icon. (You can also hit the speech bubble icon to send us feedback on the product).



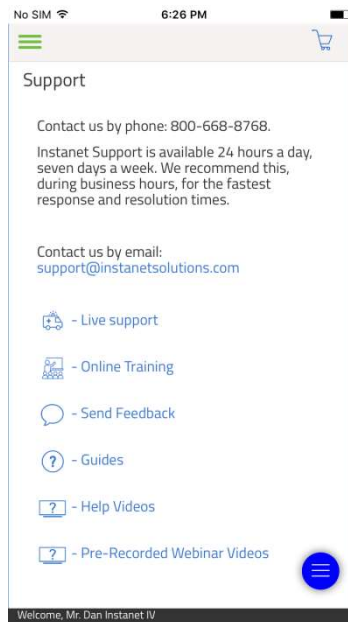
- Second way to access support is to hit the hamburger button in the top left hand corner to expand the menu and also click the question mark bubble icon there.



- Both ways lead to the same support page which is shown on the next page below.

Support is the section where you can call in for live support, use chat support or use a variety of links to check out written guides or videos on how to use the system.

- Please check your support section itself before calling. Depending on what association you are with will vary in what support number you are supposed to dial in on.



That is it for downloading, activating and using the help sections for the App.