

Introduction to:

INSTANET: INSTANETFORMS + AUTHENTISIGN + TRANSACTION DESK

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InstanetForms®

Securely create, manage and auto-populate your online forms and contracts with InstanetForms®. Our cloud based forms service is fast and simple keeping you organized so you get more done in less time.



Authentisign®

Make signing on the dotted line a snap with our fully integrated e-signature service. Our secure cloud base e-signature service works with documents from any source guaranteeing a seamless process.



TransactionDesk®

Your one-stop-shop for transaction management on mobile, tablet, or desktop. Complete with a custom dashboard, TransactionDesk® gives you access to your files. Communicate with Clients, fill in forms, review documents anywhere anytime.

Intro to Instanet

- What is Instanet?
- What is Transaction Desk?
- Forms vs Documents
- Tools provided by Transaction Desk
- How to access Transaction Desk

Settings/Prefs

- Customize Dashboard Grid
- Help Menu
- Navigation Panel
- Set up: User Information, email signature, branding, photo, etc
- Set up: Program settings
- Set up: Linked Devices
- Other Settings

Instanet Forms

- Forms Toolbar
- Existing Forms
- Getting Custom Forms Created
- Forms Emailed/Opened

AuthentiSign Wizard

- Step 1 - Details and Security
- Step 2 - Participants
- Step 3 - Fax in Document
- Step 3 - Select Document from DocBox
- Step 3 - Select Instanet Form
- Step 3 - Upload a Document
- Step 4 - Review Signing Overview
- Step 5 - Review and Send
- Recipient's View and Experience
- Confirmation

TransactionDesk Essentials

- Transaction Dashboard/Toolbar
- Creating Transaction Templates
- New Transactions with Wizard
- Adding Documents to Existing Transaction

Q &A / For more information: <https://www.instanetsolutions.com/faqs/prospect/>

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