



Transaction Desk Broker Dashboard

- I. Broker Dashboard**
 - a. Ellipse menu icon*
 - b. Hamburger menu*

- II. Broker Tools**
 - a. Review Documents*
 - b. Transaction Templets*
 - c. Office Transactions*
 - d. Agents- Impersonate*
 - e. Reports*
 - f. Office Settings*
 - g. Authentasign Templets*
 - h. Canned Notes*

- III. Set Up**
 - a. Preferences*
 - b. Program Settings*
 - c. Notifications*
 - d. Clauses*
 - e. Default Dashboard*
 - f. Check List Manager*
 - g. Transaction Templets*
 - h. Sharing*
 - i. Third Party*
 - j. Service Providers*

IV. Agent Access

- a. Create transaction*
- b. Interact with Broker set Content*

V. Broker View

- a. Visibility into office transactions*
- b. Review Widget*
 - 1. Incomplete Widget*
 - 2. Review Widget*
- c. Canned responses*