TransactionPoint® Consumer's Guide

FIDELITY
NATIONAL REAL ESTATE SOLUTIONS

Release 11.2

The company examples and the agent examples who work for such companies are not intended to depict any particular company and were created for illustration purposes only. To provide comprehensive coverage of the features available in the system, all available features are enabled and selected agents have full authority to access all of the features. This in no way implies that any particular agent at any particular Real Estate company would have access to all features covered within this guide. Contact your system administrator to verify which features are enabled for your company and which features you are authorized to access. If you are unable to access a particular feature documented here, that in no way implies that the software is functioning incorrectly.

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Overview

TransactionPoint is a Web-based, automated transaction management solution that allows your Real Estate company to provide a new level of service to its clients.

Who is a Consumer?

Within TransactionPoint, a consumer is one of the parties in a real estate transaction (a seller, a co-seller, a buyer, a co-buyer, etc.) After your email address is entered into TransactionPoint, you receive an email message containing your User ID and Password to log into the system. This allows you to see the details of any transaction in which you have participated. If your email address is not entered into the system, you can obtain the URL for the TransactionPoint Web site and a User ID and Password from your agent or the transaction coordinator at the realty company.

As a consumer, you can only view the information about the transaction and cannot make any changes to the details of the transaction. You must contact your agent or the real estate office to request any changes to any of the information about the transaction.

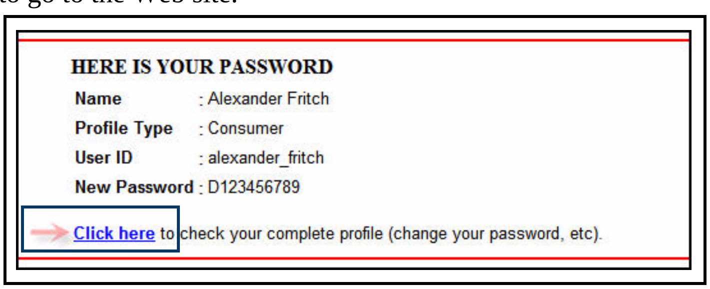
You can change your personal information and your password for logging into the system.

System Requirements

- Microsoft® Windows 2000® or higher
- Microsoft® Internet Explorer® 5.5 or higher

Accessing TransactionPoint

If you have received an email message containing your User ID and Password, click the hot link ("click here") in the email to go to the Web site.


HERE IS YOUR PASSWORD

Name : Alexander Fritch

Profile Type : Consumer

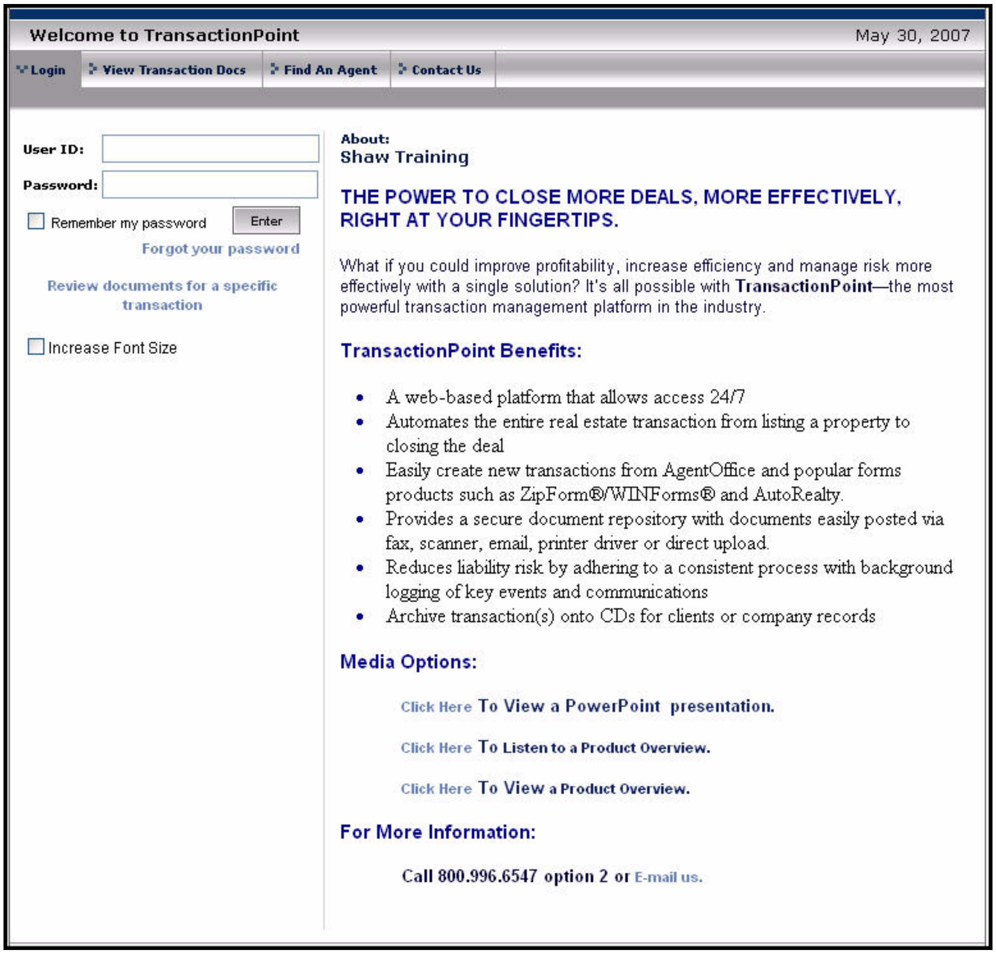
User ID : alexander_fritch

New Password : D123456789

Click here to check your complete profile (change your password, etc).

If your agent or the transaction coordinator has provided you with your logon User ID and Password and the URL to access the Web site, enter the URL in the **Address** area of your browser and press **Enter** or **Go**.

The TransactionPoint log on page appears.



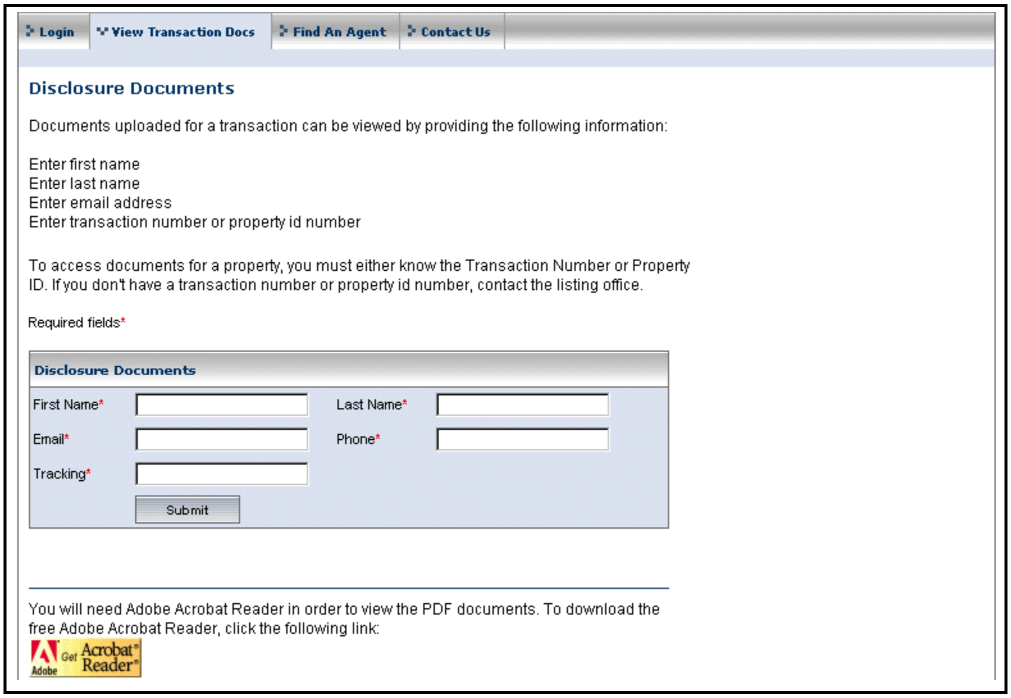
The TransactionPoint log on page allows you to log into the system and use the TransactionPoint Consumer Center. The log on page also allows you to view specific transaction documents or find an agent prior to logging into the system.

Reviewing Disclosure Documents

You can review public disclosure documents associated with a property without having to log into the system. To do so, you need either the transaction or property ID number provided to you by the agent or transaction coordinator.

1. On the TransactionPoint log on page, click the **Review documents for a specific transaction** link, or click the **View Transaction Docs** tab.

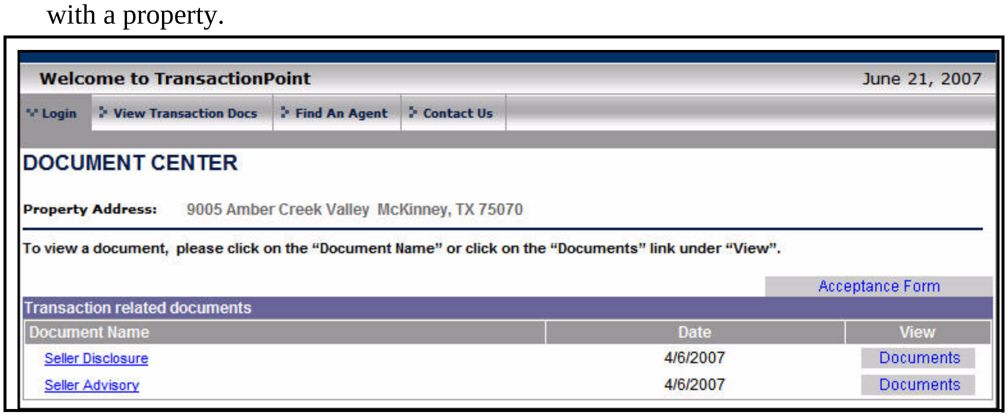
   The **Disclosure Documents** page appears.



2. Type all the required information in the fields marked with an asterisk (*).

   The **Tracking Number** is the transaction ID number or the property ID number associated with the property.

3. Click **Submit**. The **Document Center** page appears where you can review the public disclosure documents associated with a property.



4. Click the **Document Name** or **Documents** to the right of the document. The document opens in a new window.

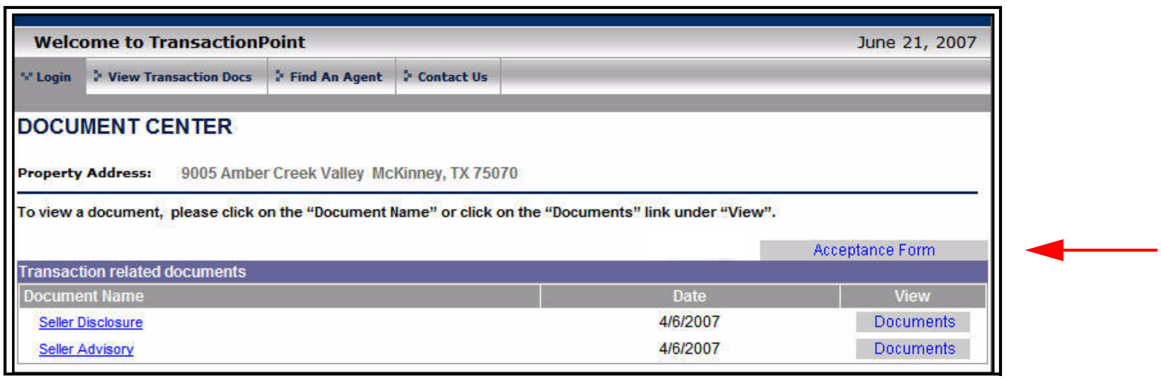
Note: To print the document, click the Printer icon, or select **File** in the top navigation area, then select **Print** in the pull-down menu.

5. Click **X** in the upper right-hand corner to close the document.

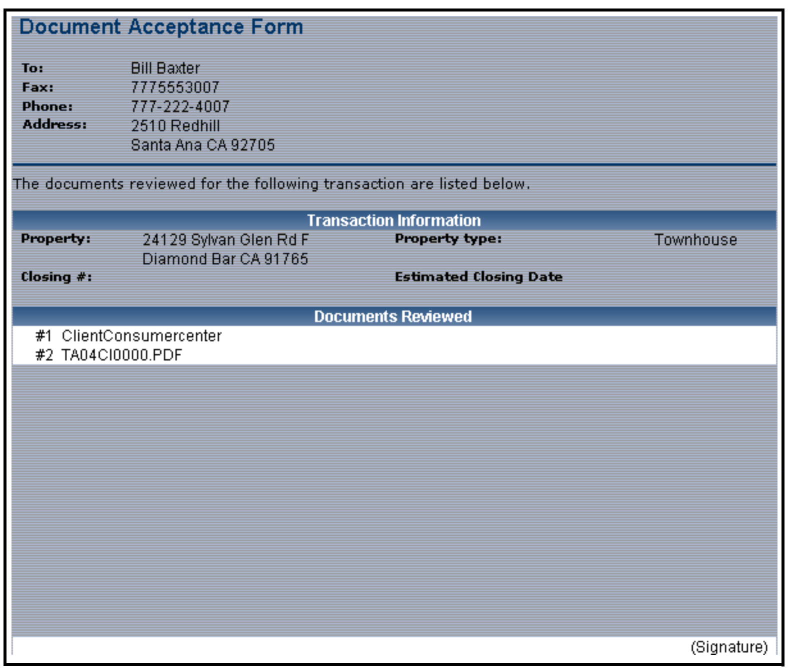
Accepting Documents

After you have reviewed all documents, use the Acceptance Form to acknowledge your review.

1. Click **Acceptance Form**.



The **Document Acceptance Form** appears.



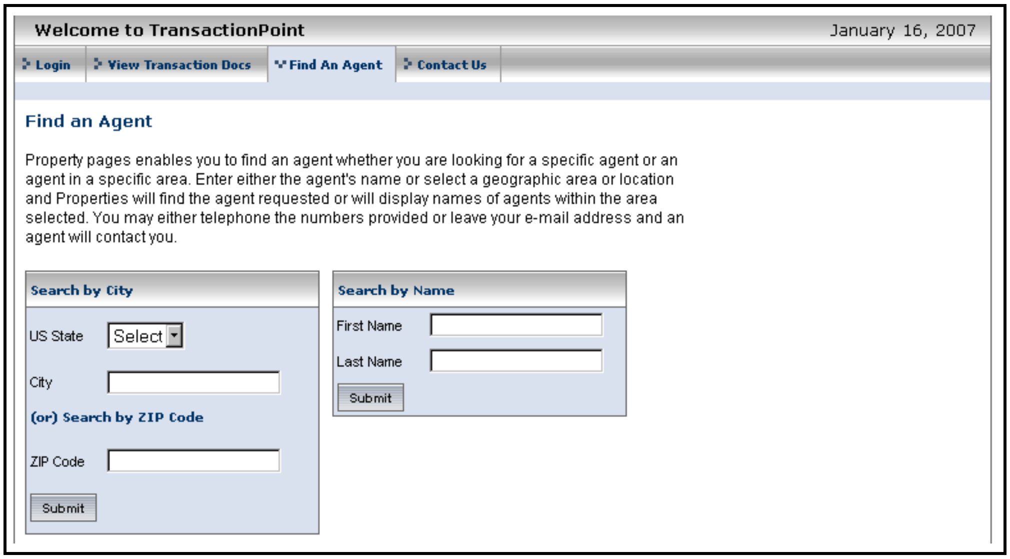
2. Click the Printer icon at the top of the page to print the form.

3. Click **X** in the upper right hand corner to close the **Document Acceptance Form** page. The **Document Center** page reappears.

Finding an Agent

You can search for a specific agent or search for an agent in a specific geographic area.

1. On the TransactionPoint log on page, click the **Find An Agent** tab. The **Find an Agent** page appears.

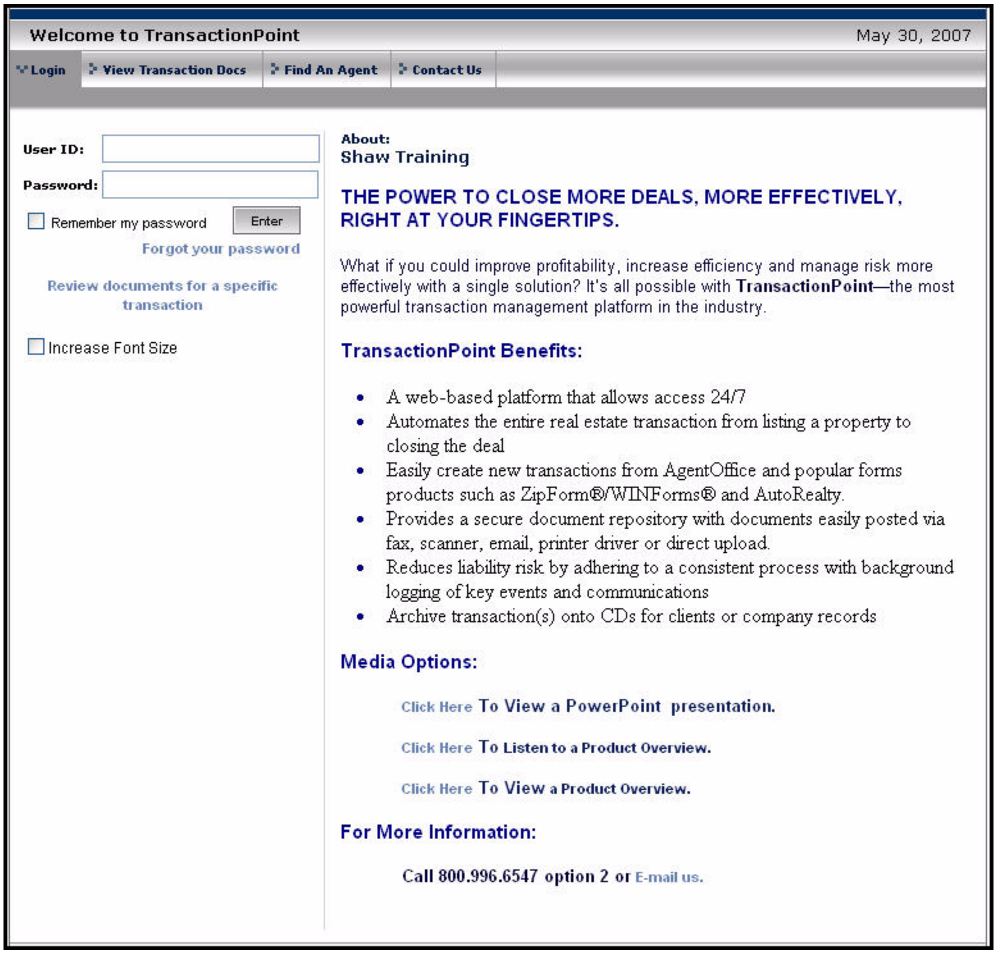


2. Use one of the following search methods:

   - To search by city, select the US State, type the city name, then click **Submit**.
   - To search by Zip Code, enter the Zip Code and click **Submit**.
   - To search by name, enter the agent's name and click **Submit**.

   The **Agent Search Results** page appears.

Logging into the Consumer Center



1. Type your **User ID**.

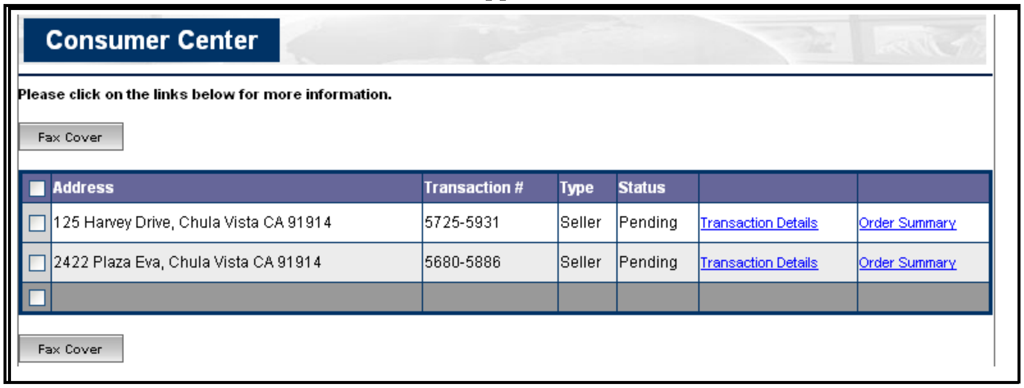
2. Type your **Password**.

Note: If you have forgotten your password but remember your user ID, you can enter the **User ID** and click **Forgot your password**. An email message will be sent to you containing your User ID and Password. If your email address is not entered into the system, contact your agent or the transaction coordinator to obtain your password.

3. If you want your system to remember your User ID and Password, select **Remember my password**. If you intend to change your initial password that was sent to you in the email message, do not select the check box at this time.

4. If you would like to increase the font size for all TransactionPoint Web pages, select **Increase font size.**

5. Click **Enter**. The **Consumer Center** appears.



In the **Consumer Center**, you can view:

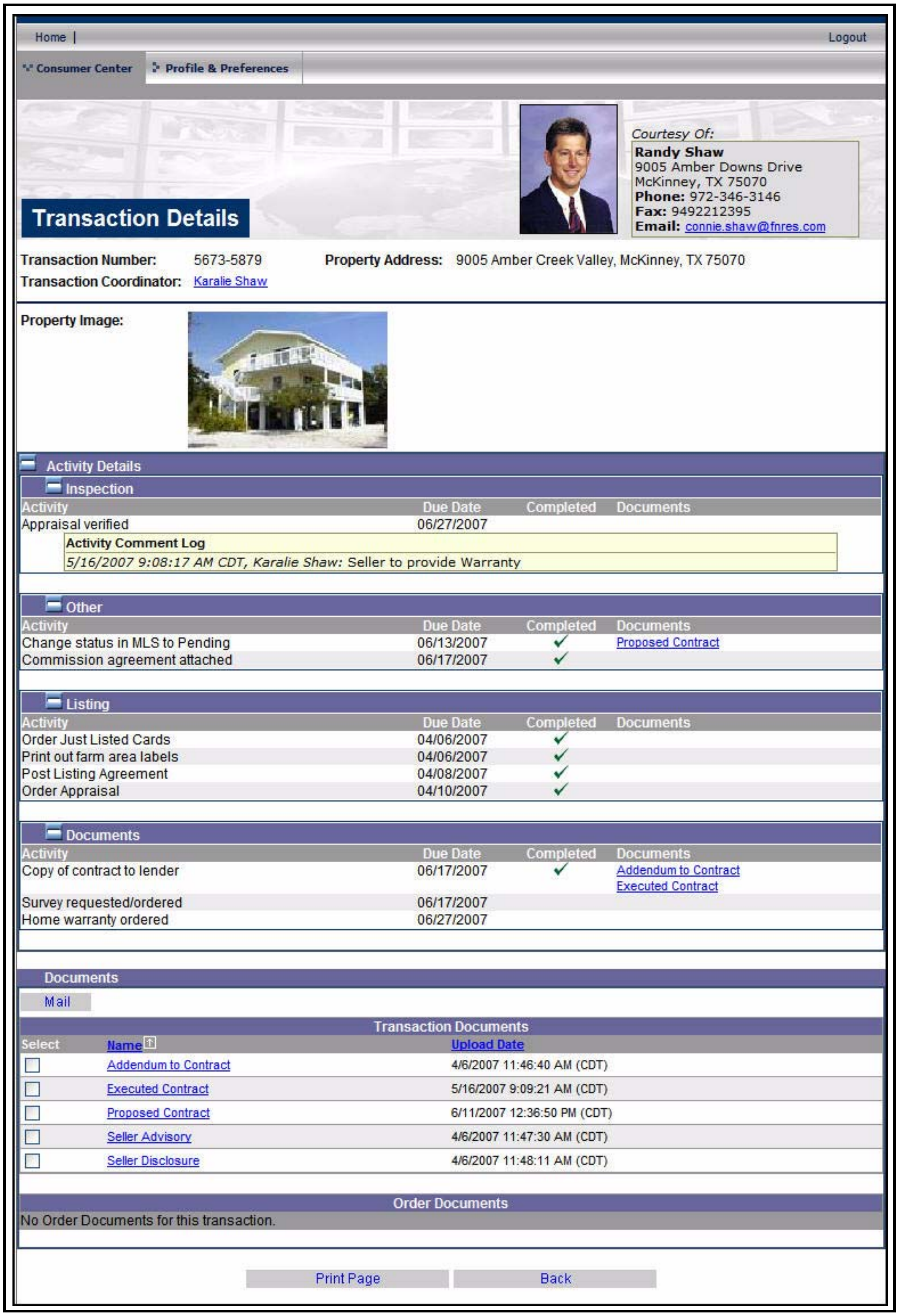
- Transaction details for a property
- A summary of orders placed for the property
- Public documents uploaded for the property

You can also generate Fax Cover sheets for transactions.

Viewing Transaction Details

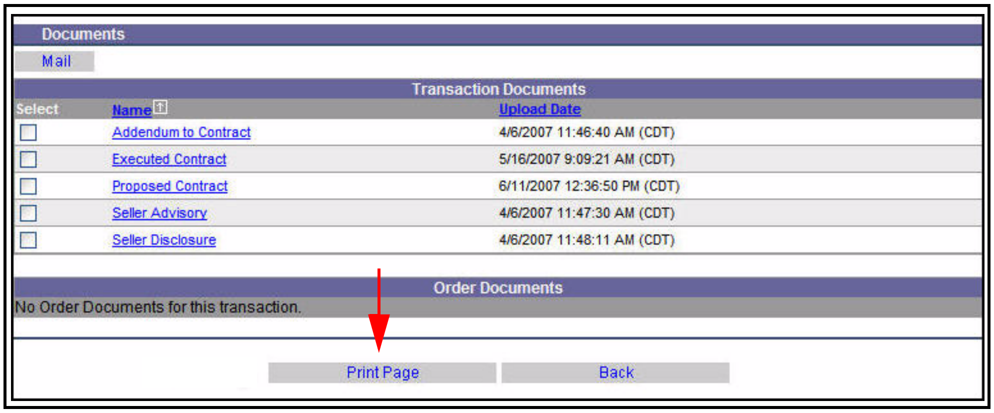
You can review a list of the activities and documents associated with a property.

1. Click the **Transaction Details** link next to the appropriate property. The **Transaction Details** page appears. You cannot make any changes to information on this page.



Printing Transaction Details

1. Click **Print Page**.



2. A File Download window appears. Choose **Open**, **Save**, or **Cancel**.

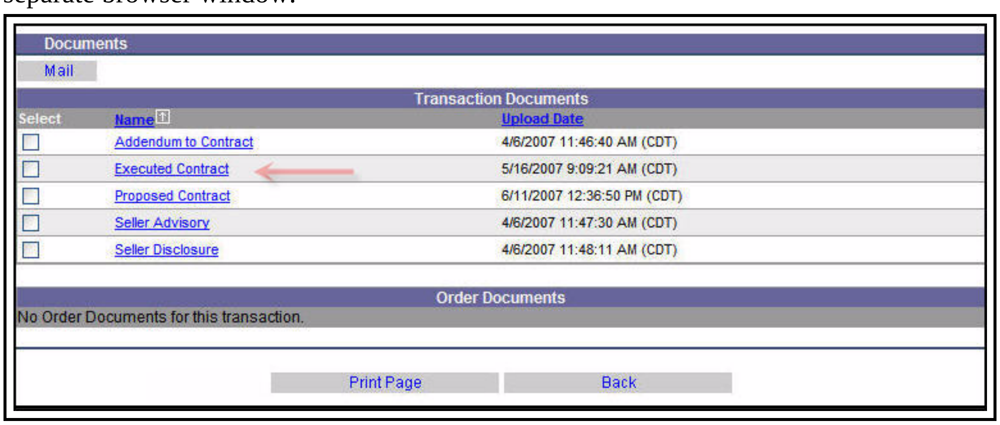
   Open displays the **Transaction Details** report.

3. Click the Printer icon
   OR
   Select **File** in the top navigation area, then select **Print** in the pull-down menu.

4. Click **X** in the upper right hand corner to close the page. The **Transaction Details** page reappears.

Viewing Transaction Documents

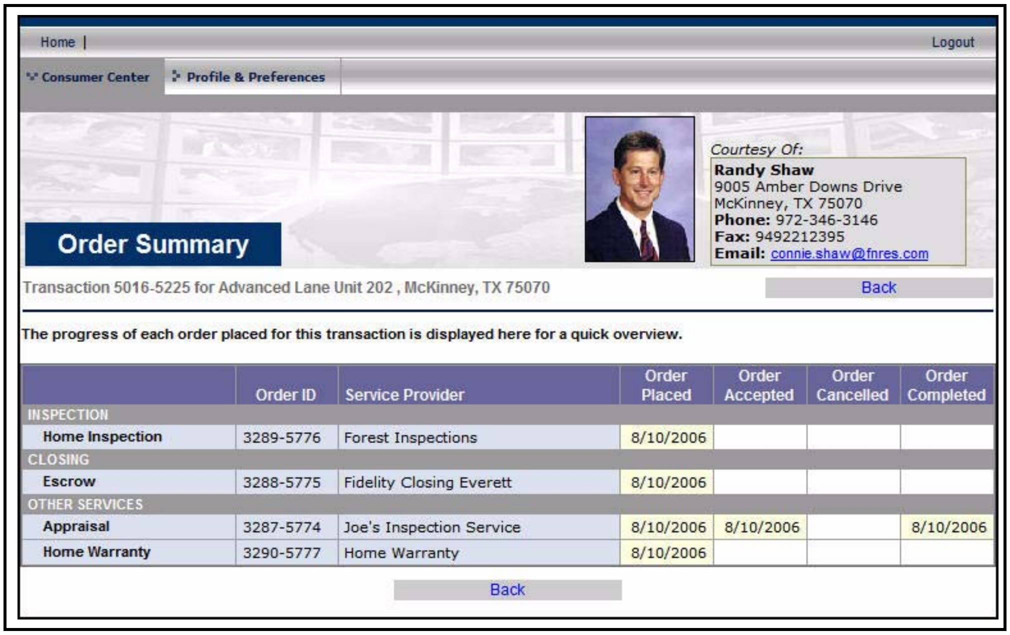
At the bottom of the Transaction Details page, click a **Document Name** to view the document. The document displays in a separate browser window.



Viewing an Order Summary

You can view all of the orders placed for a property. You can also view the details of any order, including the order status.

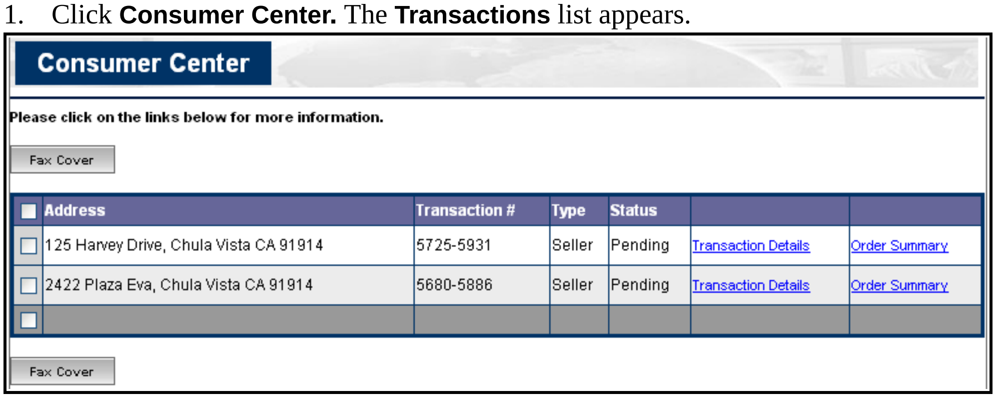
From the Consumer Center, click **Order Summary** to the right of the appropriate property. The **Order Summary** page appears.



Using Fax Covers

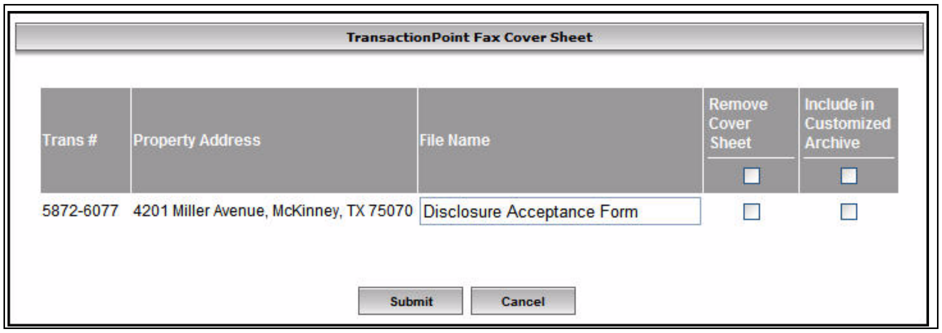
You can print barcoded Fax Cover sheets to fax documents directly into a transaction. If you have more than one document to fax for the same property, print out a cover sheet for each document. You can fax documents for transactions as a group as long as each document has its own Fax Cover sheet.

1. Click **Consumer Center.** The **Transactions** list appears.



2. Select the transactions for which you want to create Fax Cover sheets.

3. Click **Fax Cover**. The **Fax Cover Sheet** page appears.



TransactionPoint Fax Cover Sheet

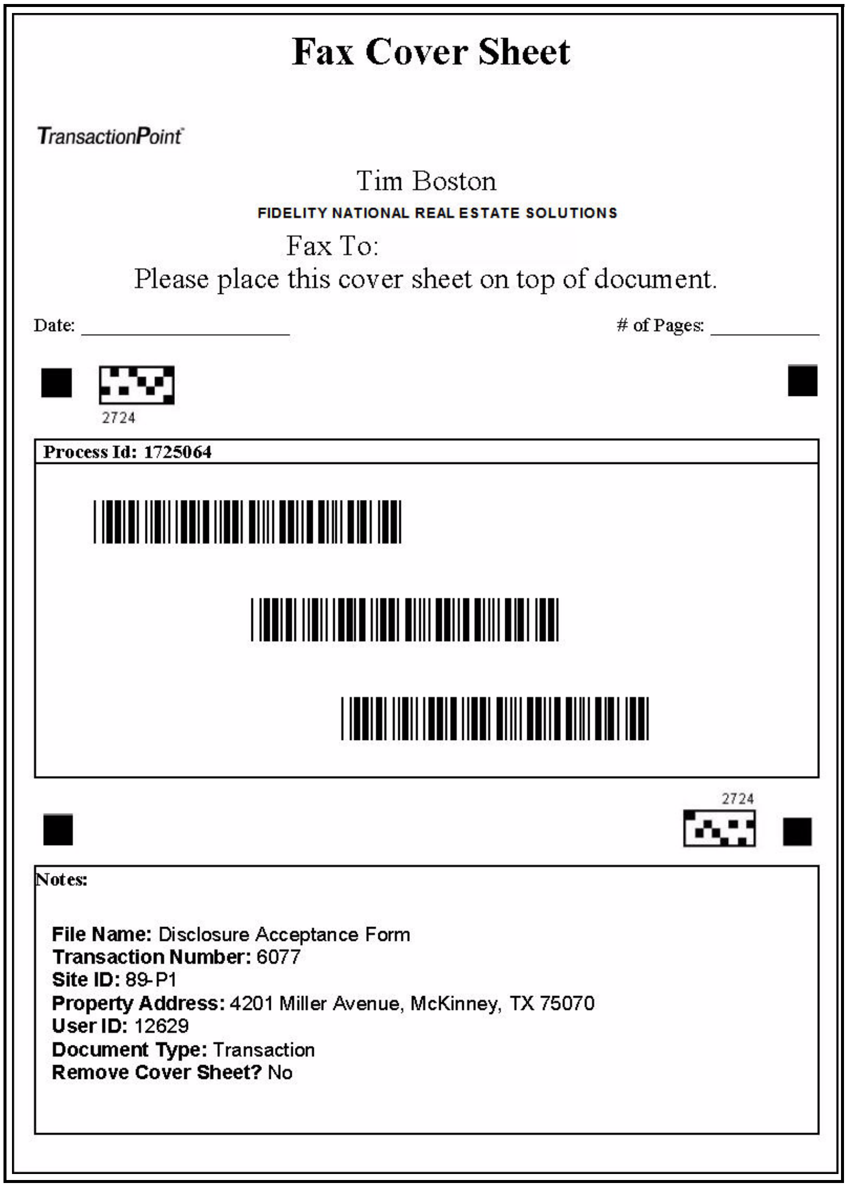
Trans #	Property Address	File Name	Remove Cover Sheet ☐	Include in Customized Archive ☐
5872-6077	4201 Miller Avenue, McKinney, TX 75070	Disclosure Acceptance Form	☐	☐

Submit Cancel

4. Type a name for the document(s). The name can contain letters, numbers and dashes, but no special characters.

5. Check **Remove Cover Sheet** and **Include in Customized Archive**, if applicable.

6. Click **Submit**. The **Fax Cover** appears. For example:



Fax Cover Sheet

TransactionPoint

Tim Boston

FIDELITY NATIONAL REAL ESTATE SOLUTIONS

Fax To:

Please place this cover sheet on top of document.

Date: ____________________ # of Pages: __________

2724

Process Id: 1725064

2724

Notes:

File Name: Disclosure Acceptance Form
Transaction Number: 6077
Site ID: 89-P1
Property Address: 4201 Miller Avenue, McKinney, TX 75070
User ID: 12629
Document Type: Transaction
Remove Cover Sheet? No

7. Print the **Fax Cover**.

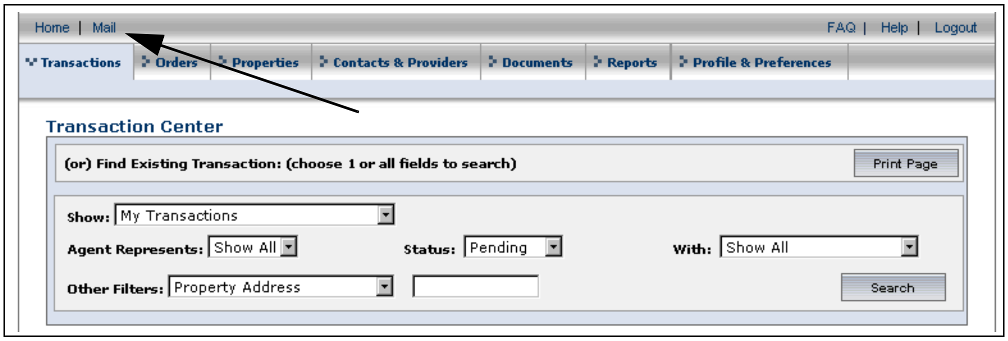
8. Fax your document to the fax number at the top of the page under your name. The documents are electronically transferred to your Transaction Coordinator or agent.

Note: The fax cover page should be on top of the document you are faxing into the transaction.

Mail Center

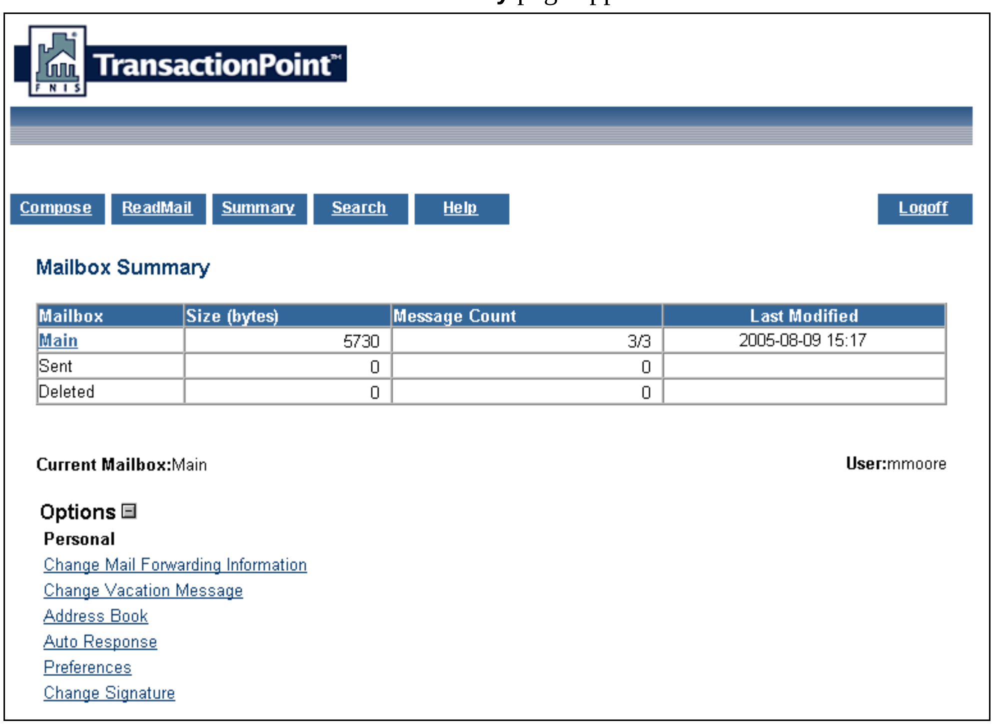
From the **Mail Center**, you can view and send mail, and view attachments. This email system is designed for your use when in TransactionPoint.

1. Click **Mail** in the top navigation toolbar.



Your mail greeting page appears.

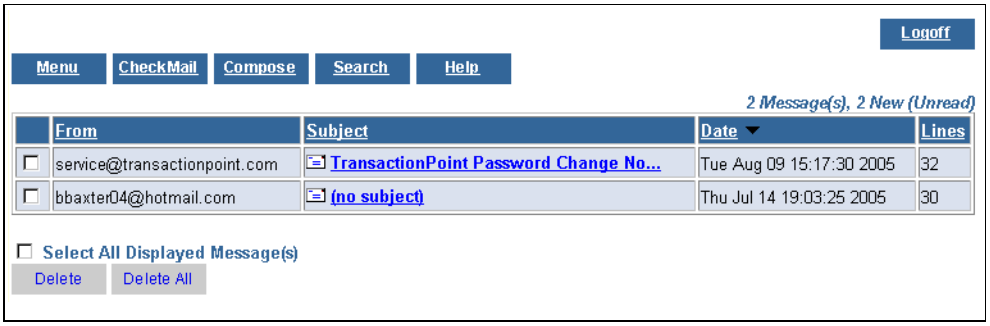
2. Click **Continue**. The **Mailbox Summary** page appears.



Viewing Your Messages

1. Access the **Mailbox Summary** page.

2. Click **Main**. A list of unread messages appears.



3. Click **Subject** to read the message.

4. Click **Menu** to return to the **Mailbox Summary** page.

Deleting Messages

Note: The deletion of messages is immediate and no confirmation message appears.

1. Access the **Mailbox Summary** page.

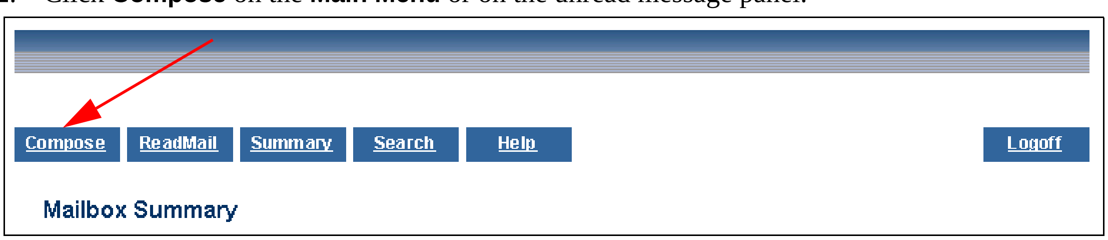
2. To delete all unread messages, click **Delete All**.
   OR
   Select the check box in front of a message(s) you want to delete.

3. Click **Delete**.

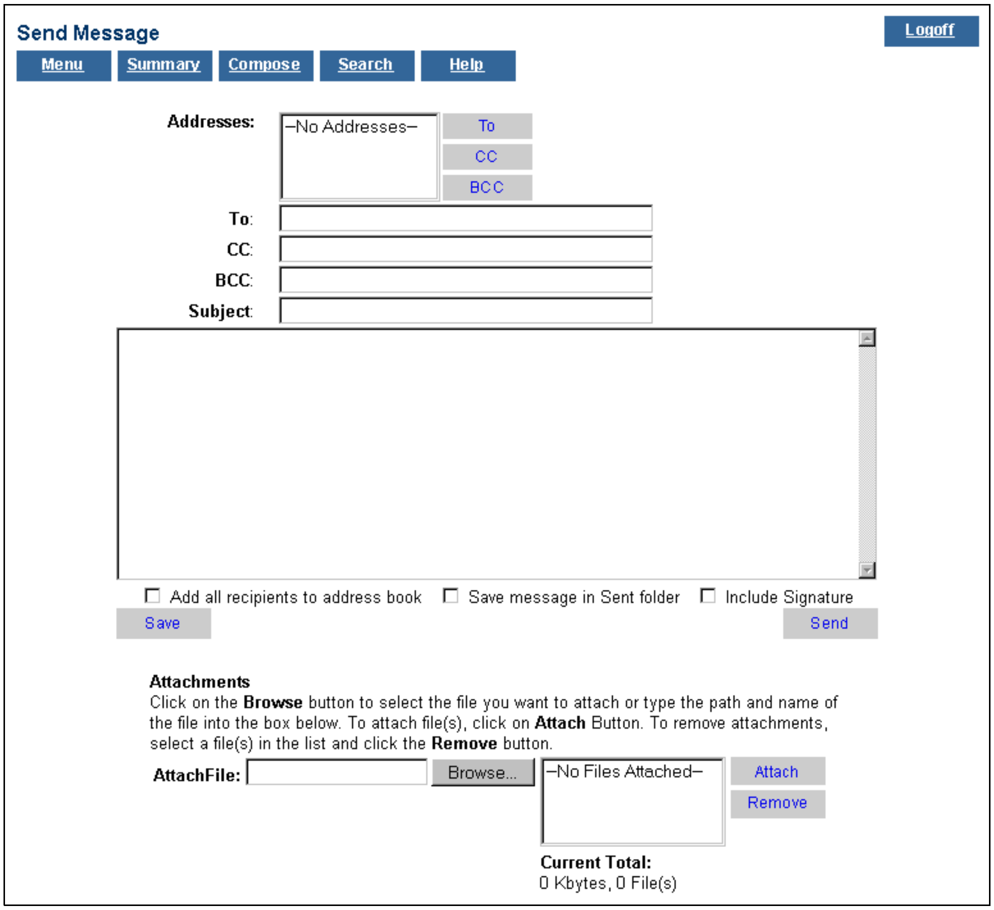
Sending a Message

1. Access the **Mailbox Summary** page.

2. Click **Compose** on the **Main Menu** or on the unread message panel.



The **Send Mail Message** page appears.



3. Type the email address of the message recipients in the **To** field, the **CC** field, and/or the **BCC** field.

4. Type the **Subject**.

5. Select **Add all recipients to address book** to add all the recipients listed to your Mail Address Book.

6. Select **Save message in Sent folder** to keep a copy of the outgoing message.

7. Select **Include Signature** to send your mail signature with the message.

8. Type the body of the message below the **Subject** field.

9. To attach a file:

   a. Click **Browse** and locate the file.

   b. Click **Attach**.

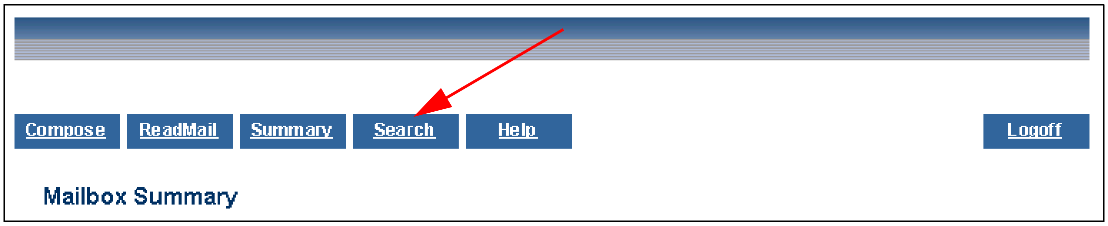
   Note: To remove an added attachment, select that file in the **List of Files Attached** field, and click **Remove** to disconnect the file from the message.

10. Click **Send**. The message and any attachments are sent to all recipients.

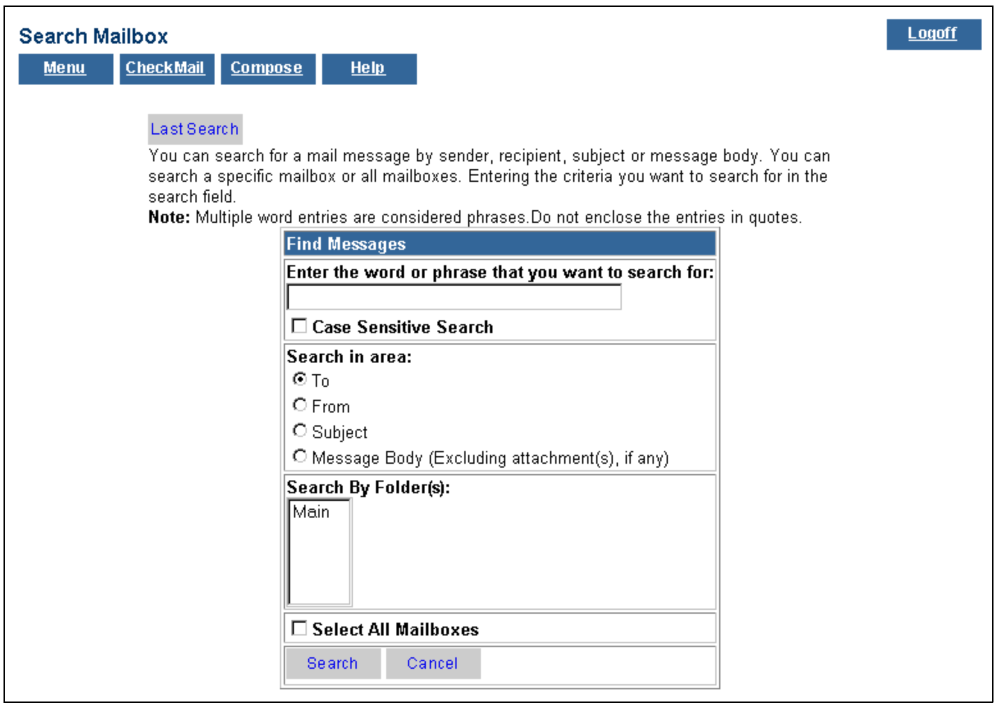
Searching for Mail

1. Access the **Mailbox Summary** page.

2. Click **Search**.



The **Search Mailbox** screen appears.

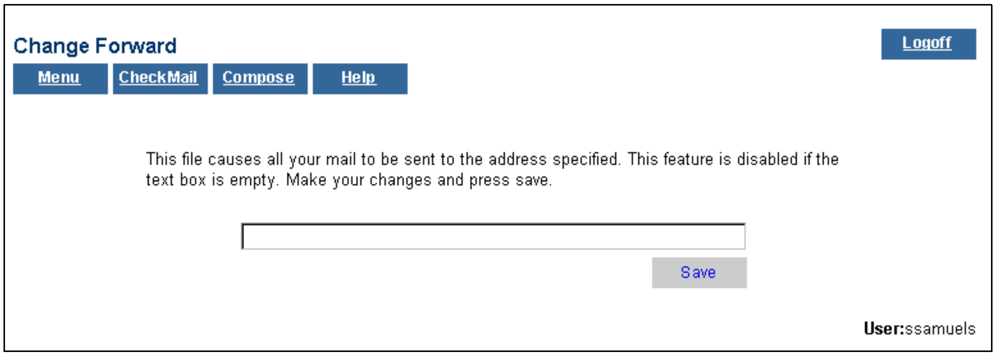


3. Enter the search criteria and click **Search**.

Changing Mail Forwarding Information

1. Access the **Mailbox Summary** page.

2. Click **Change Mail Forwarding Information**. The **Change Forward** screen appears.

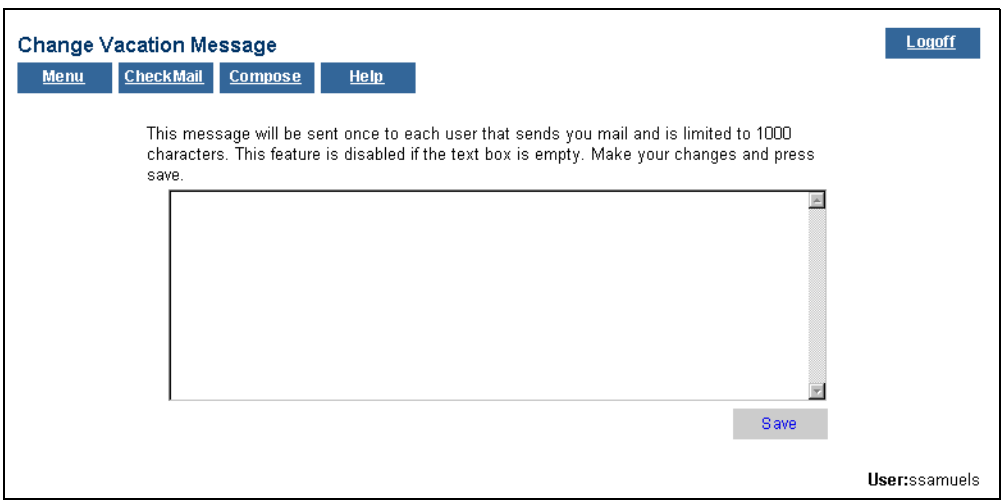


3. Type the forwarding email address and click **Save**.

Changing Your Mail Vacation Address

1. Access the **Mailbox Summary** page.

2. Click **Change Vacation Address**. The **Change Vacation Message** screen appears.

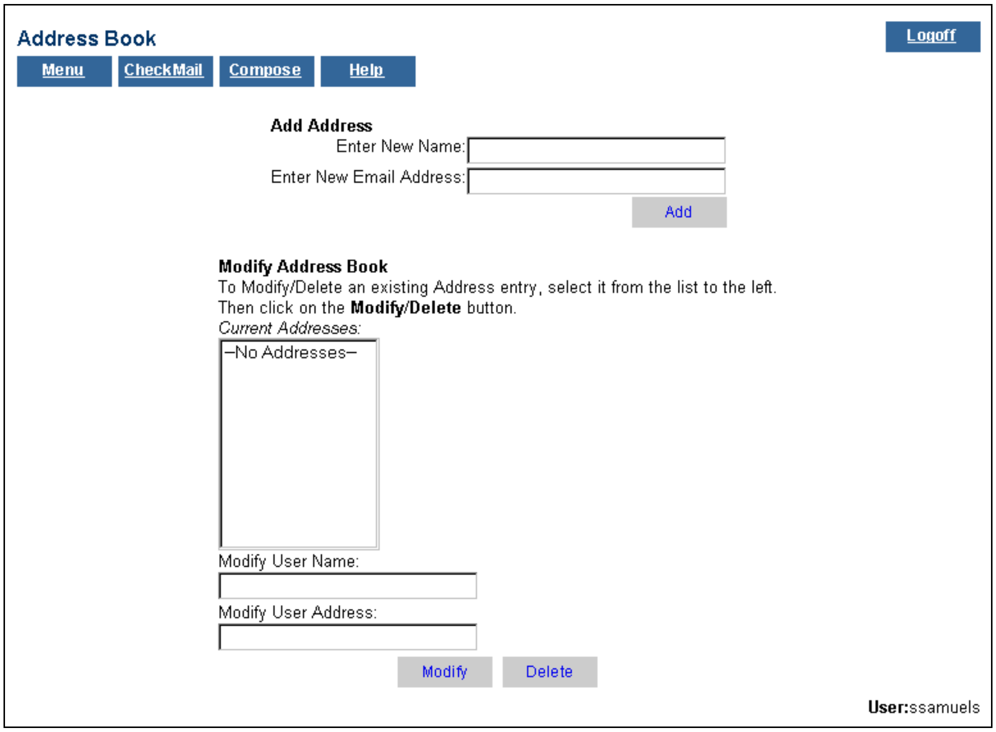


3. Type your vacation message and click **Save**.

Changing Your Mail Address Book

1. Access the **Mailbox Summary** page.

2. Click **Address Book**. The **Address Book** screen appears.



3. **Add, modify**, or **delete** your address book entries.

Changing Your Mail Auto Response

1. Access the **Mailbox Summary** page.

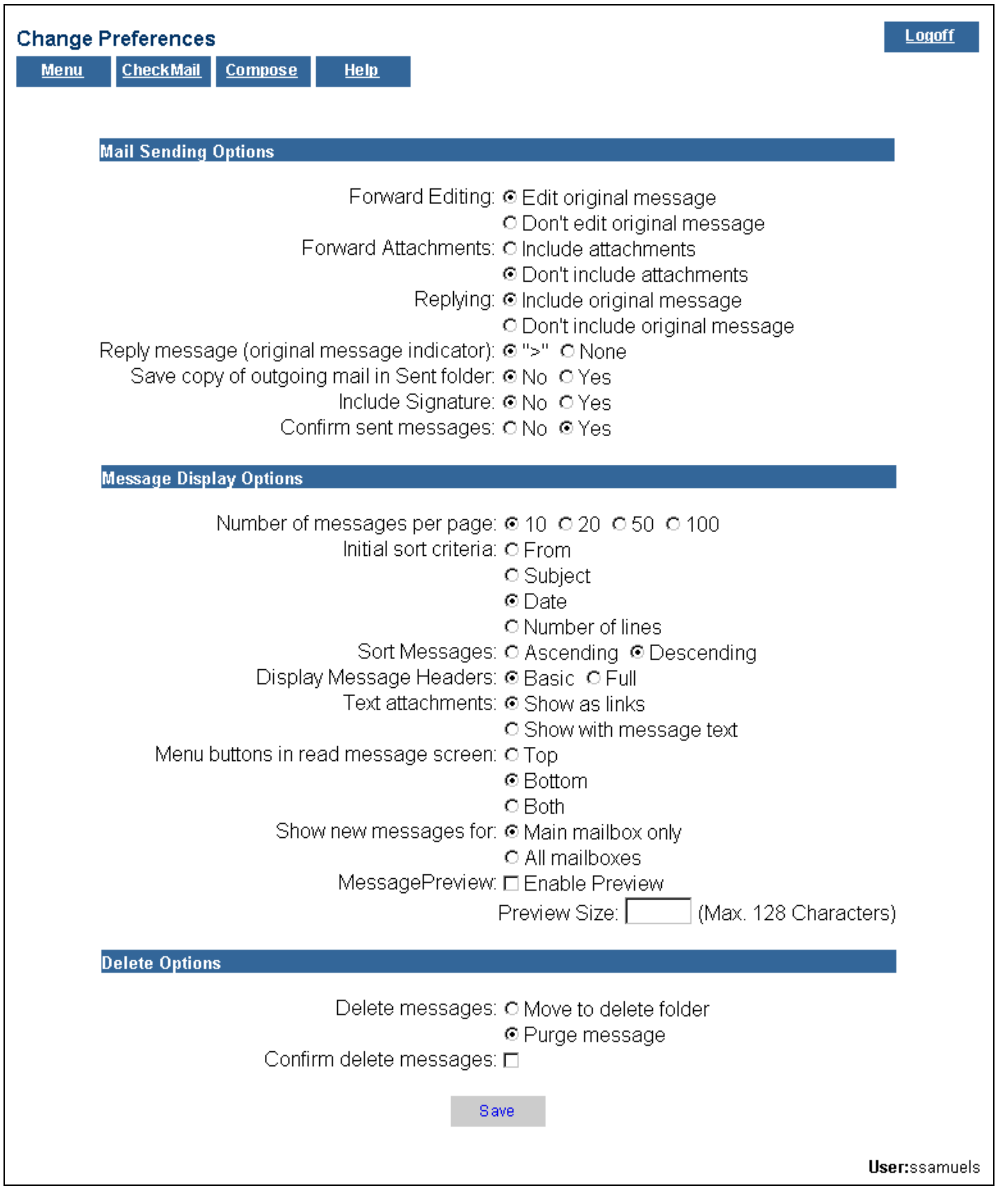
2. Click **Auto Response**. The **Auto Response** screen appears.

3. Type your auto response message and click **Save**.

Changing Your Mail Preferences

1. Access the **Mailbox Summary** page.

2. Click **Preferences**. The **Change Preferences** screen appears.



3. Change your preferences, as appropriate.

4. Click **Save**.

Changing Your Mail Signature

1. Access the **Mailbox Summary** page.

2. Click **Change Signature**. The **Change Signature** screen appears.

3. Enter the information.

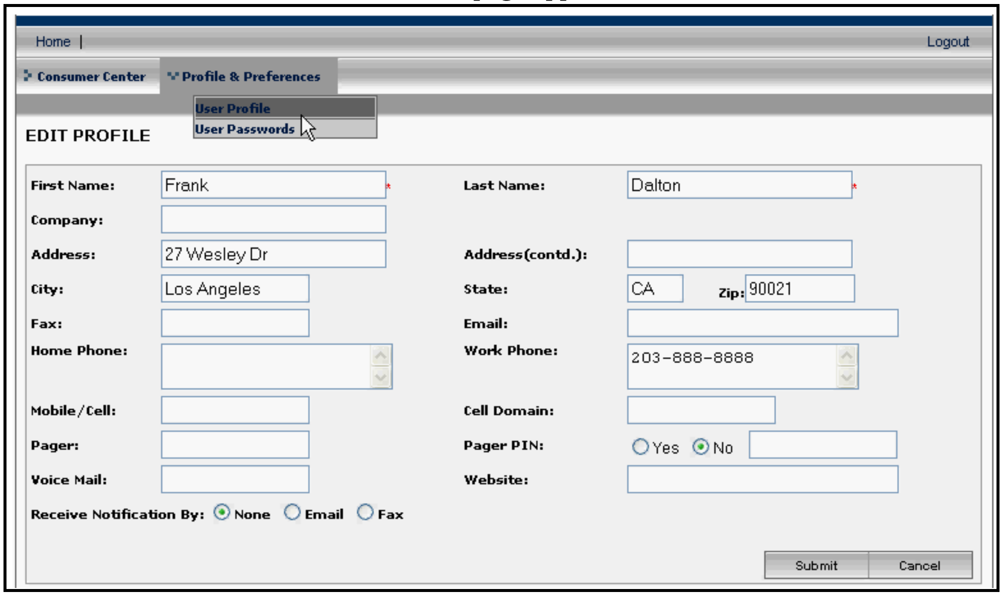
4. Click **Save**.

Changing Your Profile

You can change your personal information, such as mailing or email address.

1. Click the **Profile & Preferences** tab.

2. Click **User Profile**. The **Edit Profile** page appears.



3. Edit the fields, as appropriate. Required fields are marked with an asterisk (*).

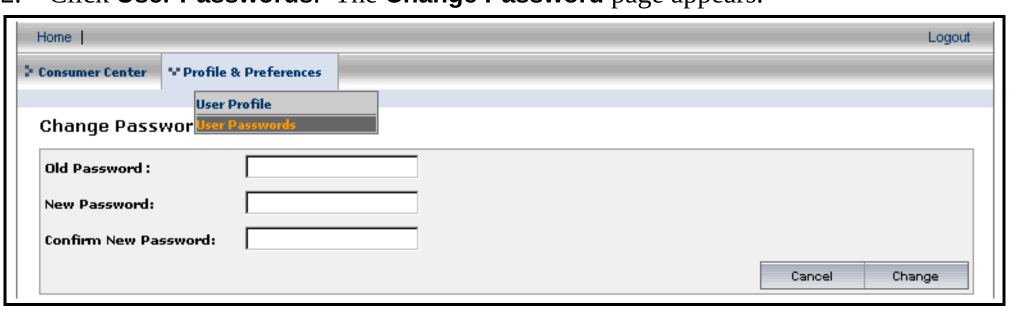
4. Click **Submit**.

Changing Your Password

You can change the password you use to log into TransactionPoint.

1. Click the **Profile & Preferences** tab.

2. Click **User Passwords**. The **Change Password** page appears.



3. Type your **Old Password**.

4. Type your **New Password**.

5. Retype your new password in the **Confirm New Password** field.

6. Click **Change**. The **Password Confirmation** page appears.

7. Click **Finished**. The **Consumer Center** reappears.

Logging Out

1. Click **Logout** in the top navigation area of the **Consumer Center**. A logout confirmation page appears.

2. Click **OK**.