

# Transaction Desk - Global Header

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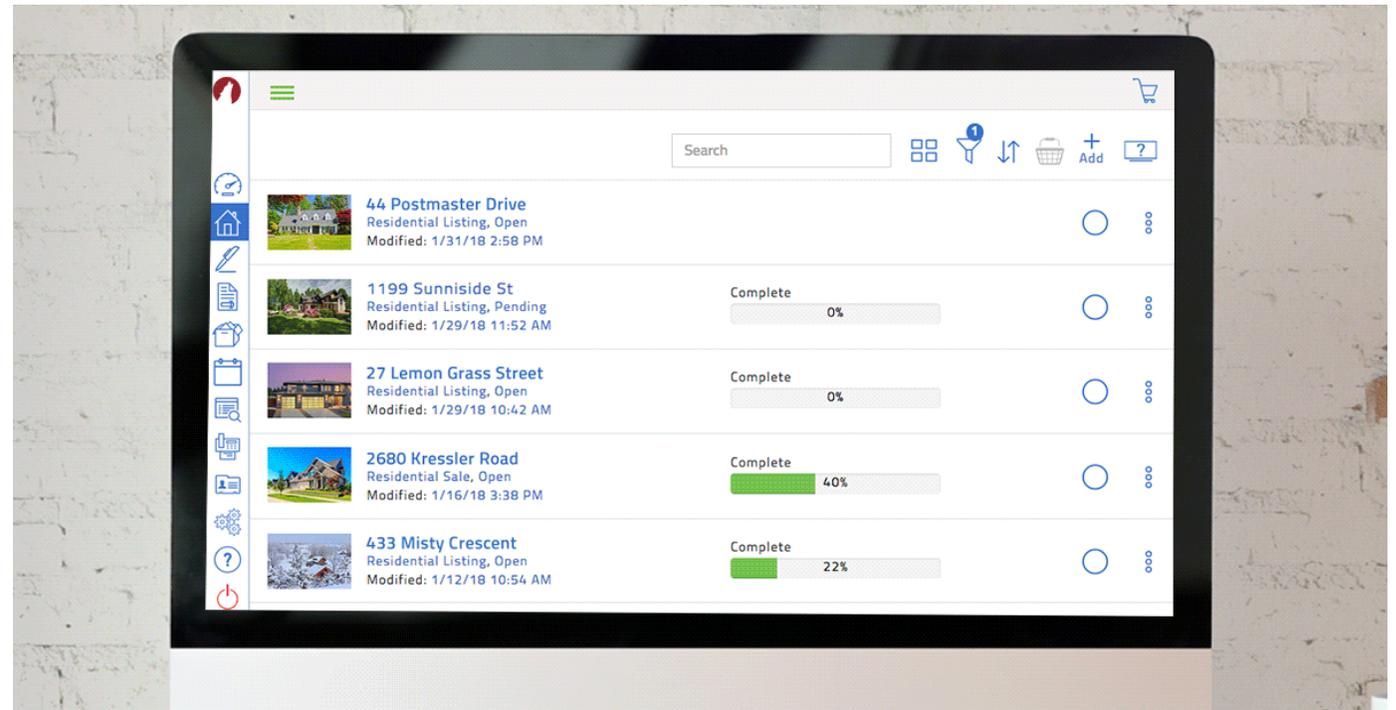
# Global Header

## What is the Global Header?

This enhancement is for the headers within Transactions (TransactionDesk Edition). The new global header updated the navigation menu and will help you easily find the resources you need.

- Now available! Templates and Clauses in the left navigation panel—this makes them readily accessible when needed and no longer buried within settings.

## PREVIOUS & CURRENT



# Global Header (Continued)

## A closer look of Transaction Desk Dashboard layout

The screenshot shows the Transaction Desk Agent Dashboard. On the left is a navigation sidebar with items: Dashboard, Transactions, Signings, Forms, Documents, Tasks, Contacts, Clauses, Templates, and Partners. Callout 1 points to the Clauses menu item, and callout 2 points to the Templates menu item. The main dashboard area is titled 'Agent Dashboard' and contains several panels: Transactions (with a 'Create Transaction' button), Authentisign (with a 'Start Signing' button), Email (with an 'Email Documents' button), Upload (with a 'Document Upload' button), and Clause (with a 'Create Clause' button). The central area displays a list of transactions, including one for 'test' and another for 'DAVE CALANDRINO'. On the right, there are panels for Forms and Documents. In the top right corner, there is a user profile menu with 'Settings' and 'Logout' options. Callout 3 points to the user profile icon, callout 4 points to the Settings option, and callout 5 points to the Logout option. At the bottom left, it says 'Welcome, Dave Calandrino'. At the bottom center, it says '| Español | TransactionDesk | Powered by Lone Wolf Technologies | © 2023'. At the bottom right, there is a lightbulb icon.

### 1 Templates

Easily manage your checklist and select transaction templates with a quick click from the left-side panel.

### 2 Clauses

With just one click from the left-side panel, you can also segregate your Personal, Office, and System clauses easily.

### 3 Help

Have a question? The help menu is in the top right corner next to account settings. Find quick answers to common questions, access live chat with our client support team, and more.

### 4 Account settings

Account settings are in the top right corner. Just tap your avatar to manage your passwords, personal information, and other preferences.

### 5 Logout

Sign out of Transactions (TransactionDesk Edition) smoothly and securely by going into your account settings menu.

# For Support:

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