

TransactionDesk Release Notes: 19.16.00

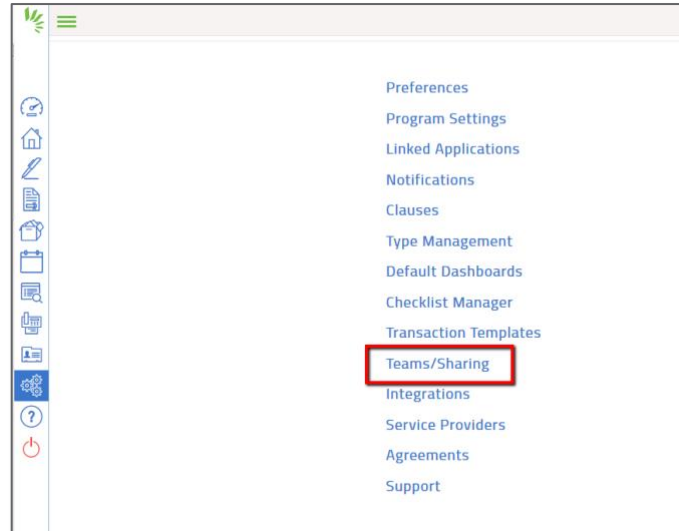


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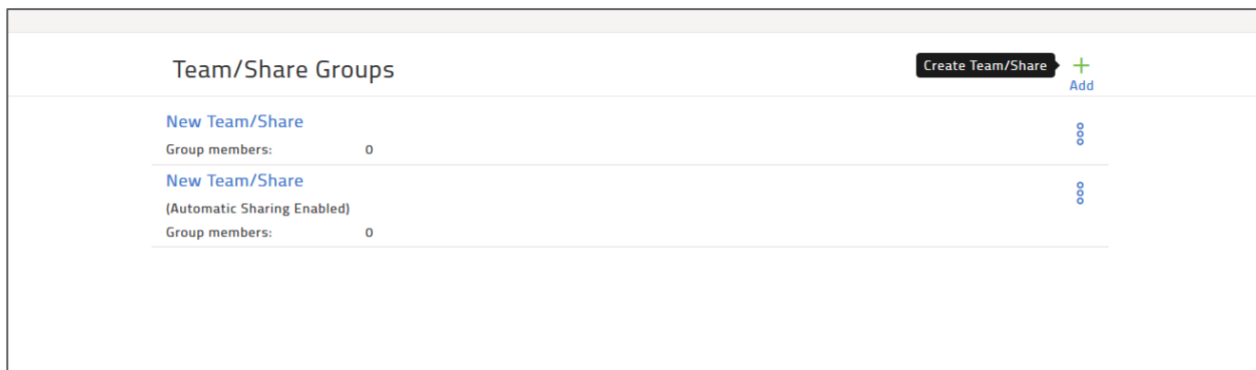
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We have implemented a new “Teams/Share” Feature

- We have renamed Sharing to “Teams/Sharing” on the setup menu



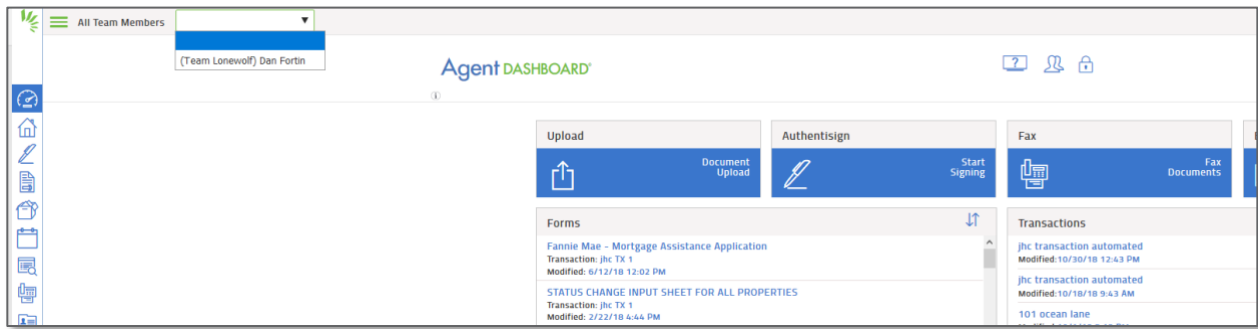
- Re-designed the “Teams/Sharing” list view. We now indicate whether the “Team/Share” group has automatic sharing enabled as well as changed the titles and tooltips (Note: Automatic Sharing is a broker edition feature).



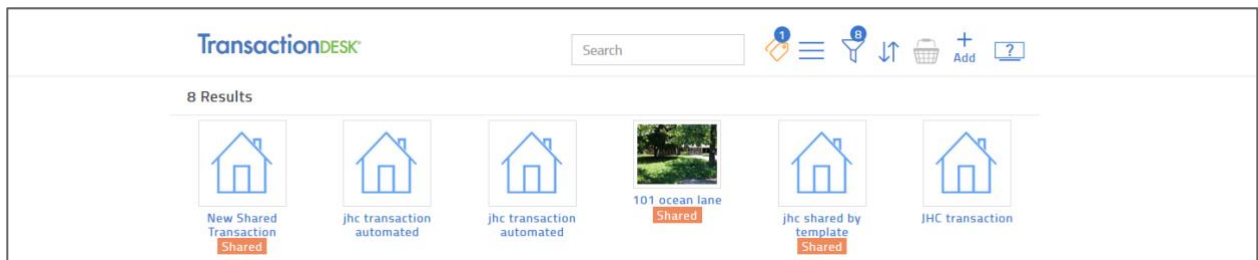
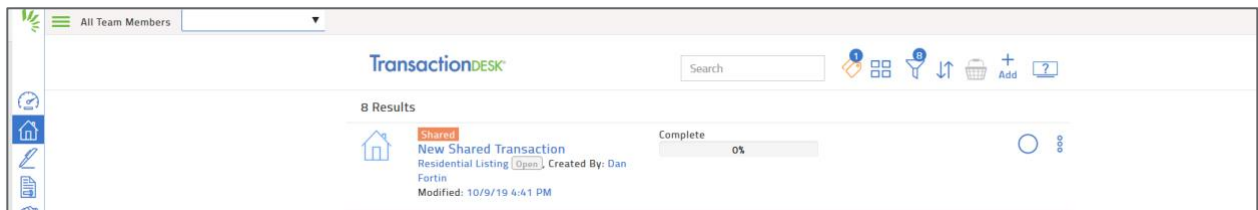
- We have re-designed the “Team/Share” setup page.
You will now see:
 - A team member search box
 - The ability to select available team members by checkbox as well as a select all option
 - The ability to automatically share transaction so you no longer have to manually share a transaction,
 - Converted the transaction permissions into a drop down selection
 - Added the ability to allow those you add to your team to impersonate for scenarios such as being able to send out signings on your behalf.

- We have added some logic that if you try to leave without saving the settings above, we will prompt you to either save or continue without saving.

- If someone adds you to their “Team/Share” and enabled agent impersonation. That user will now have an agent impersonation dropdown on their account. This allows them to quickly impersonate someone on their team. Anyone that adds you to their team will appear in this drop down with the name of that team/share.



- We have updated the “Shared” indicator icons on a transaction as well as have added it to grid view so you can identify what transactions have been shared with you easier.



- We have added a new notifications section. This will allow you to toggle on notifications you will receive when someone has added you to their team. The notifications include:
 - Team/Share - Notify Me When a Shared Transaction is Created
 - Team/Share - Notify Me When a Shared Transaction is Deleted
 - Team/Share - Notify Me When a Shared Transaction Document is Deleted
 - Team/Share - Notify Me When a Shared Transaction Status Changes

Notifications

Email notification is enabled for the "Checked" items

- General
- Task
- Teams/Share
 - Team/Share - Notify Me When a Shared Transaction is Created
 - Team/Share - Notify Me When a Shared Transaction is Deleted
 - Team/Share - Notify Me When a Shared Transaction Document is Deleted
 - Team/Share - Notify Me When a Shared Transaction Status Changes
- Super User

Save

- We have updated the history section to account for when team members make changes to that transaction.



- Authentisign - Remove reCaptcha (and solve for simultaneous signing sessions)

Bug Fixes:

- Authentisign Mobile iOS – Corrected an issue where your contact list would freeze when you had more than 20 contacts.
- Transaction Signings – Correct an issue where signings attached to transactions were not visible when the Authentisign subscription was expired.
- Print Driver – Corrected an issue where documents were showing blank previews when they were uploaded to Docbox

4. Document Slicer – Corrected an issue where saving a document with special symbols like “&” was cutting off the name afterwards
5. TransactionDesk Forms – Corrected an issue where the contact name was not being removed from the form when you deleted the contact in the transaction
6. Transaction Details – Corrected an issue so now you will see the brokerWOLF number on the Transactions/Transaction Header and broker file review section.
7. Document Copy/Move - When using the copy or move action both dialogue screens should close when action has been completed now
8. Transaction Share – Corrected an issue so now anyone you share a transaction with can upload docs directly from the transaction into the checklist item.
9. TD Fax – Added validation to ensure there is a proper fax format before sending
10. TransactionDesk Forms – Corrected an issue where the font size was not displaying correctly from the forms markup tools
11. Checklist – Corrected an issue where users were bypassing the office setting to force a user to associate the checklist item with a checklist category
12. Service Orders - Removed the ability to rename a document in a created service order as it was producing errors
13. Search Bars – Introduced a character limit on the search bar
14. Broker File Review – Added color indicators on the external doc review page accessed via the email notification
15. Anonymous Form Editor – Corrected an issue where editable form links were still active after the form was deleted
16. Print Driver – Corrected an issue where the login information was not being preserved correctly forcing users to generate a new app code each time
17. Transaction Shares – Corrected an issue where the share group linked to a template was not being applied to an already existing transaction when applied.
18. Preflight System Check – Added the new Mac OS/Browser versions into the accepted system requirement list