

The screenshot shows the CREA WEBForms Member Dashboard. The interface includes a sidebar on the left (1) with navigation links: Dashboard, Transactions, Forms, Documents, Tasks, Faxing, Contacts, Setup, Apps Store, Support, and Logout. The main area is titled 'Member Dashboard' (2) and contains several sections: Transactions (with a 'Create Transaction' button), Email Documents, Upload Document, Tasks, Forms, and Documents. The Transactions section lists items like 'test2' and 'Transaction 1'. The Forms section lists 'Agency Disclosure - 205 (Rev. 02/2019)'. The Documents section lists 'Forms.pdf' and 'Test 2.pdf'. At the top right, there are icons for Quick Start (3), Legacy (4), Help Videos (5), and Dashboard Lock (6). At the bottom right, there is a Short Cut Button (8) and a Dashboard Widgets icon (7).

The CREA WEBForms® **Member Dashboard** has a few key areas and icons:

1. Sidebar
2. Sidebar toggle
3. Link to Quick Start
4. Link to CREA WEBForms Legacy (will disappear January 2nd)
5. Link to Help Videos
6. Dashboard Lock
7. Dashboard Widgets
8. Short Cut Button

Sidebar

The sidebar shows the CREA WEBForms logo and the text 'Powered by TransactionDesk'. Below the logo is a list of navigation links: Dashboard, Transactions, Forms, Documents, Tasks, Faxing, Contacts, Setup, Apps Store, Support, and Logout.



TRANSACTIONS is the list of your transactions, or the transactions that are shared with you.



FORMS represent legal contracts that are filled out interactively online.

Caution: Once a form is signed and returned to you, it goes to the Documents folder.

Caution: We highly recommend always creating a transaction when working with Forms. Because you can group multiple forms together in one file, you can take advantage of the auto population feature from the details section to the forms. You can also upload relevant docs into your transactions. You can also name the transaction whatever you like.

The Individual forms folder is only recommended for printing blank versions of forms.



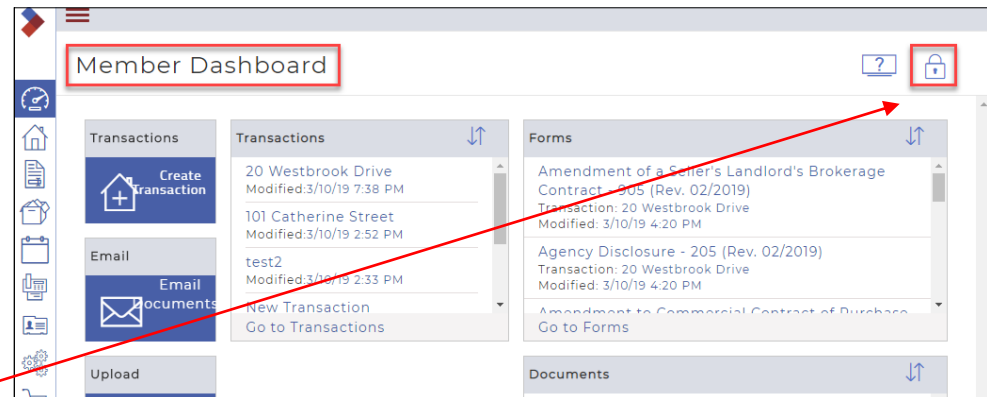
Use DOCUMENTS to store, organize, manage, access, and work with your documents.


Note: Once a form is filled out and sent back to you, you will find it in Documents.

Customizing your Member Dashboard

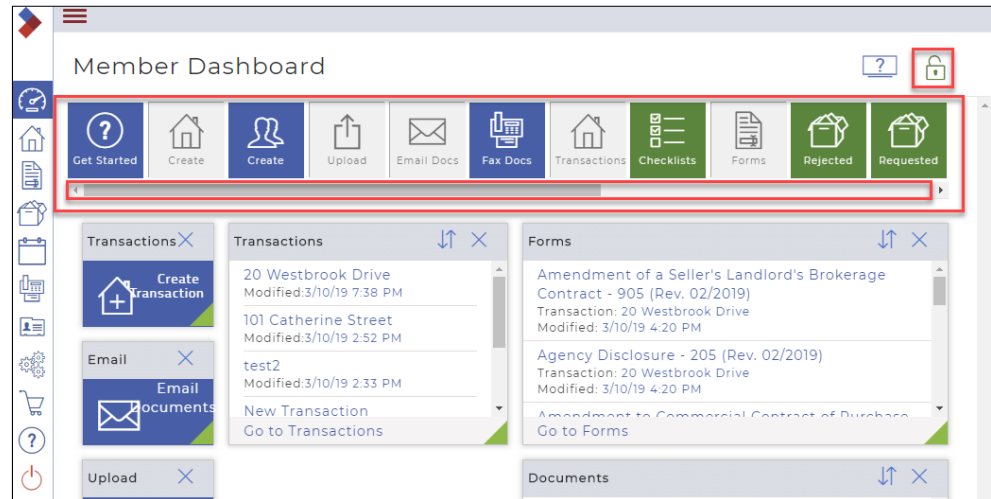
You can change your member dashboard to include the information that is most important to you as a salesperson. To customize:


1. In the Sidebar, click **Dashboard** .
Your **Member Dashboard** displays.



2. Click **Lock**  .
Your dashboard is unlocked, with the Widget tray (note the scroll bar) displayed at the top.
3. Review the available widgets and determine what information will be most useful for you to see in the Member Dashboard.
For descriptions of the widgets, see below.

Note: You can view more Widgets by using the scroll bar directly beneath the widget tray.




4. Drag and drop widgets onto the highlighted space in the dashboard. Continue to drag and drop widgets until you see the key information you require in your dashboard. Be sure you select the widgets that will be most helpful to you. For example, if you frequently upload documents, add the Document Upload widget to your dashboard.
 - The **grey** widgets are the ones that are already on the screen.
 - The **blue** widgets are shortcuts. You can use as many of the blue widgets as you like.
 - The **green** widgets provide at-a-glance summaries of information. You can use a maximum of six of the green widgets in your dashboard.
5. When you are finished selecting widgets for the Member Dashboard, click **Lock**  to lock the dashboard configuration so you do not change it accidentally.

Customizing your Transaction Dashboard

Each user of the system can personalize their view of the transaction dashboard, to make it as meaningful as possible. When you customize your view, it does not affect any other user's view of transactions. It does, however, define the view you see for every transaction.

To customize your Transactions Dashboard:

1. In the Sidebar, click **Transaction**  .
Your **Transactions** display.

2. Click the name of any transaction
Your **Transaction Dashboard** displays.


3. Click **Lock**  .
Your dashboard is unlocked, with the Widget tray (note the scroll bar) displayed at the top.

4. Review the available widgets and determine what information will be most useful for you to see in the transaction dashboard.

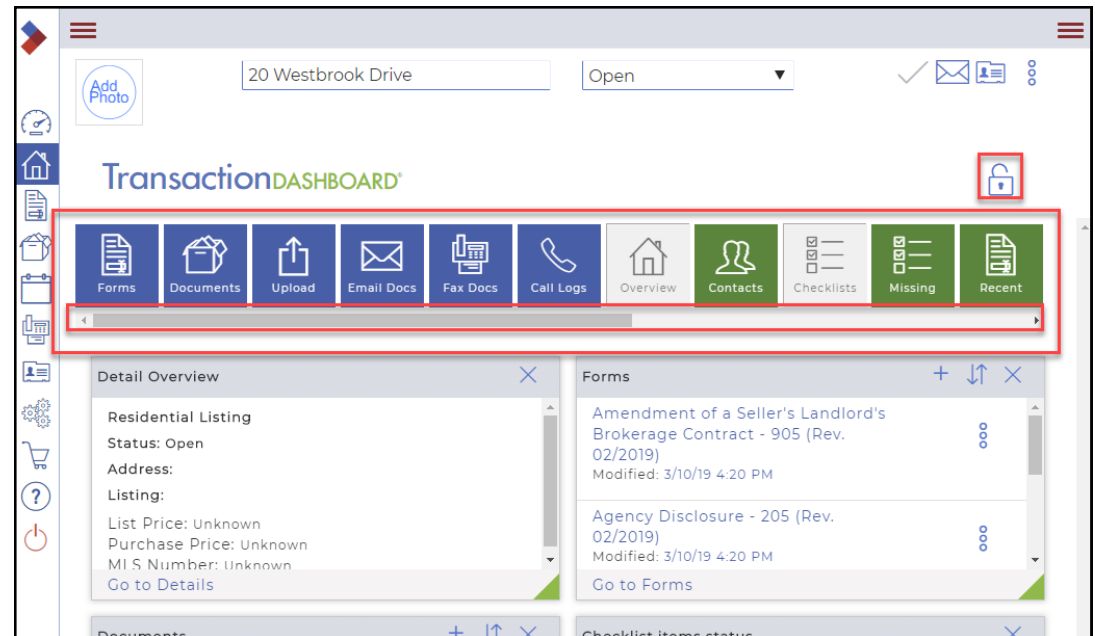
Note: You can view more Widgets by using the scroll bar directly beneath the widget tray.

5. Drag and drop widgets onto the highlighted space in the dashboard. Continue to drag and drop widgets until you see the key information you require for your dashboard. Be sure you select the widgets that will be most helpful to you for most of your transactions. For example, if you use checklists as a template, you probably want to use the Missing widget (Checklist items not uploaded) so you can see at a glance which tasks are not yet done.

- The **grey** widgets are the ones that are already on the screen.
- The **blue** widgets are shortcuts.
You can use as many of the blue widgets as you like.
- The **green** widgets provide at-a-glance summaries of information.
You can use a maximum of six of the green widgets in your dashboard.

6. When you are finished selecting widgets for the transaction dashboard, click **Lock**  to lock the dashboard configuration so you do not change accidentally.

In the future, whenever you view a transaction, you see the same transaction dashboard.





Setup

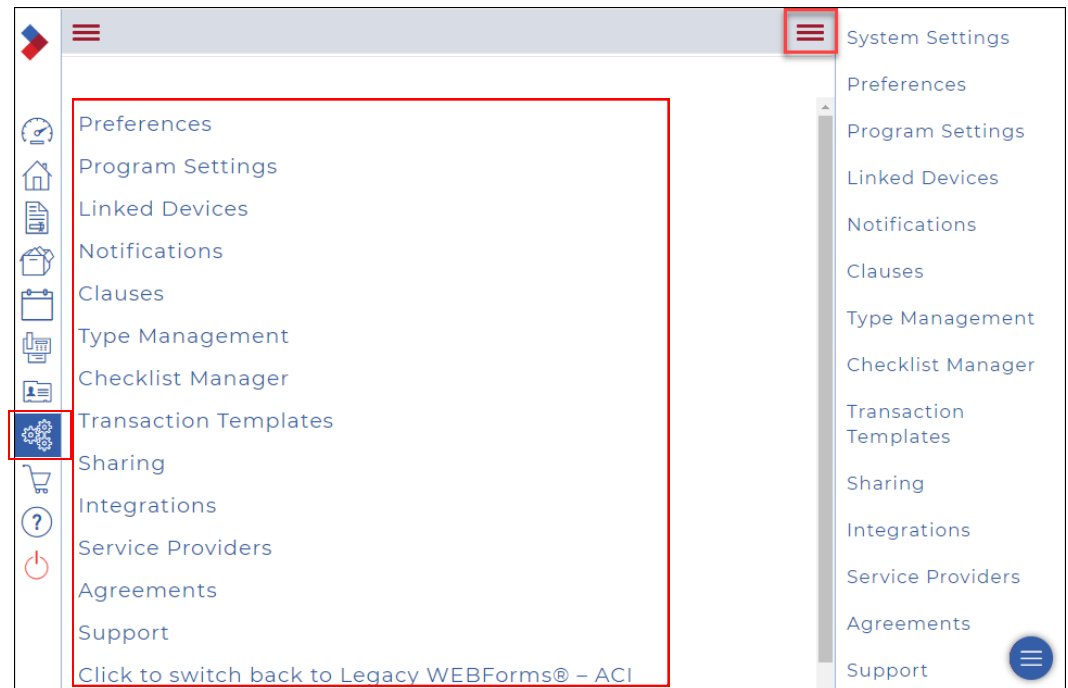


Use the Setup options to manage system defaults, such as default dashboards that salespersons see, standard checklists for the various types of transactions, transaction templates, notification options, and more.

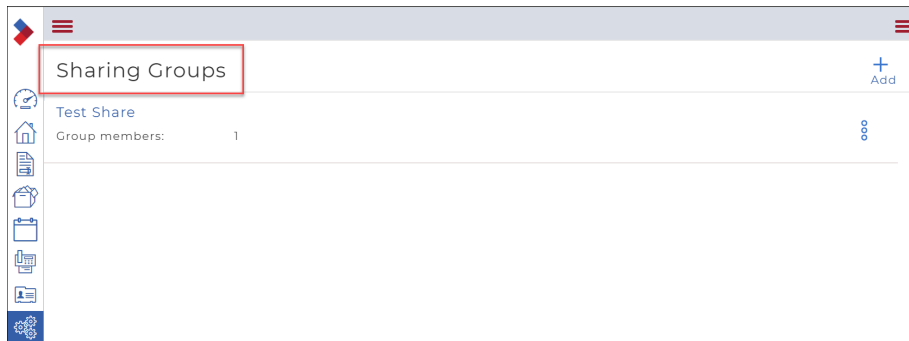
To view **Setup** options:

1. In the left Sidebar, click **Setup**  .
The **Setup** menu displays.

2. Click **Expand Menu**  to expand the right menu.
The **Setup** menu now displays on the right, to help you navigate through the options.



Sharing



Teams of salespeople that work together can share some or all deals. Before salespeople can share transactions in the system, the salespeople must be added to the same “sharing group / team”. Every salesperson can create a sharing group or team and add or remove salespeople as needed.