



DocBox Printer by Instanet Solutions

User Guide



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User Guide

Getting Started and Setting your password

- You will need to login to your DocBox/TransactionDesk account to set your DocBox Printer password.
- Login, click on the 'Settings' tab, 'My Preferences' and Print Driver Settings

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User Guide

Getting Started and Setting your password

- First, make sure the box labeled, “Yes, I want to enable the DocBox Printer Driver” is checked.
- Most of you will want to use one password when logging into DocBox2Go and other remotely accessed DocBox/TransactionDesk features (e.g.—the DocBox print driver). If that is the case, make sure ‘Use the same password I’m already using to access my TransactionDesk account.’ is checked and then click on the ‘click here’ link in the sentence that says, “to manage your account password, click here...”
- Otherwise, uncheck the second checkbox and enter in a password.


Preference Options


- ▶ General Settings
- ▶ User Information
- ▶ Password Management
- ▶ Transaction Settings
- ▶ Task Settings
- ▶ Appointment Settings
- ▶ Email Signature
- ▶ Form Settings
- ▶ Document Settings
- ▶ Faxing Settings
- ▶ Contact Settings
- ▶ Account Activity
- ▶ Provider/Order Settings
- ▶ Notification Settings
- ▶ Print Driver Settings
- ▶ DocBox2Go Settings
- ▶ TopProducer Settings

 **DocBox Print Driver**

- Enable your PC to print directly to your TransactionDesk transaction files and your DocBox Inbox. You can also email and fax documents at the same time without having to go to the TransactionDesk website.

In order to use this service you'll need to download and install the print driver. Link for each are immediately below. You'll also need to use the User Key below. Please download both the printer driver and the user guide to get started. Make sure to read the user guide before you start!

 Click [here](#) to download the print driver.

 Click [here](#) for the user guide.

DocBox Printer Driver

Yes, I want to enable the DocBox Printer Driver.
User Key: 0027C484-BFE3-4146-A9B6-B061F0C05ED5

Use the same password I'm already using to access my TransactionDesk account.

To manage your account password, [click here](#) and you will be taken to the Password Management section of My Preferences.

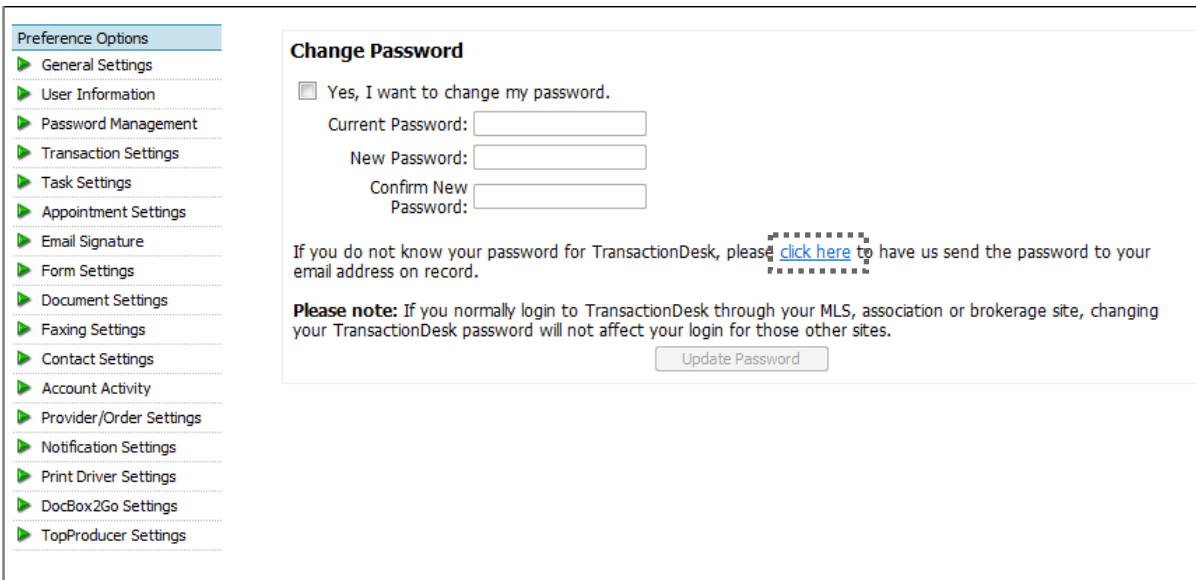
For future reference you can navigate to your Password Management by clicking in the Settings tab at the top of the page, click on My Preferences on the left and again on Password Management, also on the left.

For more information on DocBox Print Driver, [click here](#).

User Guide

Getting Started and Setting your password

- If you clicked on the link that says, "To manage your account password, click here..." you will be taken to the Password Management section of My Preferences, shown below.
- **Note:** Many of you login via your MLS, Association or brokerage website and do not know your password in our system. However, everyone has a password on our system.
- In order to get that password, click on the link outlined in red to have it emailed to you.
- Your password will be emailed to the email account on record in our system. You can double-check that email address by clicking on the 'User Information' link on the left side of the My Preferences screen, shown below.
- Once you have your password, enter it and then enter your new password.
- **Note:** Your DocBox/TransactionDesk password is not related to any other password. It can be the same or different than passwords you use for other systems such as your MLS, association site, brokerage site, etc.



The screenshot shows a web interface with a left-hand navigation menu and a main content area. The navigation menu is titled 'Preference Options' and includes the following items: General Settings, User Information, Password Management, Transaction Settings, Task Settings, Appointment Settings, Email Signature, Form Settings, Document Settings, Faxing Settings, Contact Settings, Account Activity, Provider/Order Settings, Notification Settings, Print Driver Settings, DocBox2Go Settings, and TopProducer Settings. The 'Password Management' item is highlighted. The main content area is titled 'Change Password' and contains a checkbox labeled 'Yes, I want to change my password.' Below this are three input fields: 'Current Password:', 'New Password:', and 'Confirm New Password:'. A red dashed box highlights a 'click here' link in the text: 'If you do not know your password for TransactionDesk, please [click here](#) to have us send the password to your email address on record.' Below this text is a 'Please note' section: 'Please note: If you normally login to TransactionDesk through your MLS, association or brokerage site, changing your TransactionDesk password will not affect your login for those other sites.' At the bottom of the form is an 'Update Password' button.

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Your User Key

- You will need to have your user key to enable the DocBox Print Driver when you first use it.
- Copy the User Key from the page shown below, which you can access by navigating to by clicking 'Settings' tab > 'My Preferences' > Print Driver Settings.
- Paste the key somewhere you can access it after you install the software. Alternately, leave the Print driver settings page open and copy and paste the key into the print driver software when prompted after installation. You will only have to do this once.

1.

2.

3.

Preference Options

- General Settings
- User Information
- Password Management
- Transaction Settings
- Task Settings
- Appointment Settings
- Email Signature
- Form Settings
- Document Settings
- Faxing Settings
- Contact Settings
- Account Activity
- Provider/Order Settings
- Notification Settings
- Print Driver Settings
- DocBox2Go Settings
- Top Producer Settings

DocBox Print Driver

- Enable your PC to print directly to your TransactionDesk transaction files and your DocBox Inbox. You can also email and fax documents at the same time without having to go to the TransactionDesk website.

In order to use this service you'll need to download and install the print driver. Link for each are immediately below. You'll also need to use the User Key below. Please download both the printer driver and the user guide to get started. Make sure to read the user guide before you start!

- Click [here](#) to download the print driver.
- Click [here](#) for the user guide.

DocBox Printer Driver

- Yes, I want to enable the DocBox Printer Driver.

User Key: 0027C484-BFE3-4146-A9B6-B061F0C05ED5

- Use the same password I'm already using to access my TransactionDesk account.

To manage your account password, [click here](#) and you will be taken to the Password Management section of My Preferences.

For future reference you can navigate to your Password Management by clicking in the Settings tab at the top of the page, click on My Preferences on the left and again on Password Management, also on the left.

For more information on DocBox Print Driver, [click here](#).

User Guide

Getting Started — Downloading the software

- Download the software, which you can access by navigating to by clicking 'Settings' tab > 'My Preferences' > Print Driver Settings.

Preference Options

- ▶ General Settings
- ▶ User Information
- ▶ Password Management
- ▶ Transaction Settings
- ▶ Task Settings
- ▶ Appointment Settings
- ▶ Email Signature
- ▶ Form Settings
- ▶ Document Settings
- ▶ Faxing Settings
- ▶ Contact Settings
- ▶ Account Activity
- ▶ Provider/Order Settings
- ▶ Notification Settings
- ▶ **Print Driver Settings**
- ▶ DocBox2Go Settings
- ▶ TopProducer Settings

DocBox Print Driver

- ▶ Enable your PC to print directly to your TransactionDesk transaction files and your DocBox Inbox. You can also email and fax documents at the same time without having to go to the TransactionDesk website.

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▶ Click [here](#) to download the print driver.

▶ Click [here](#) for the user guide.

DocBox Printer Driver

Yes, I want to enable the DocBox Printer Driver.
User Key: 0027C484-BFE3-4146-A9B6-B061F0C05ED5

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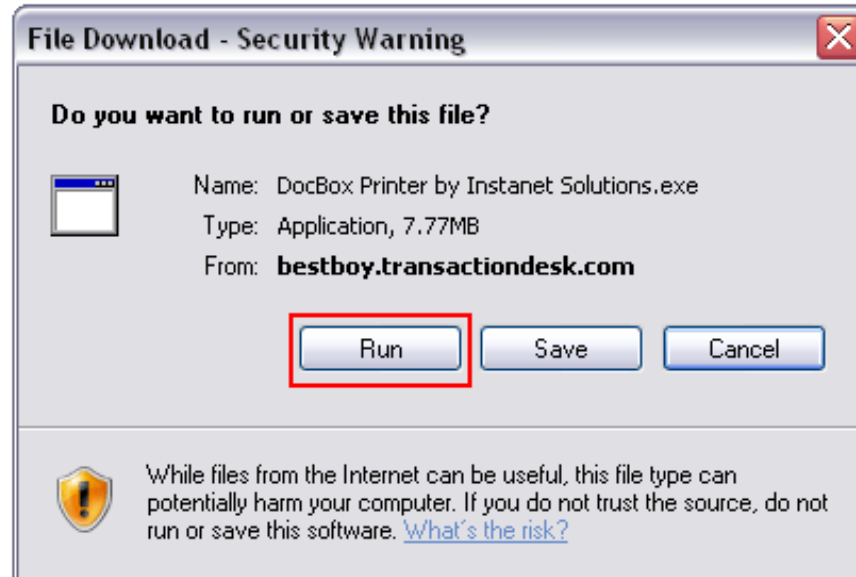
For future reference you can navigate to your Password Management by clicking in the Settings tab at the top of the page, click on My Preferences on the left and again on Password Management, also on the left.

For more information on DocBox Print Driver, [click here](#).

User Guide

Installing the Software

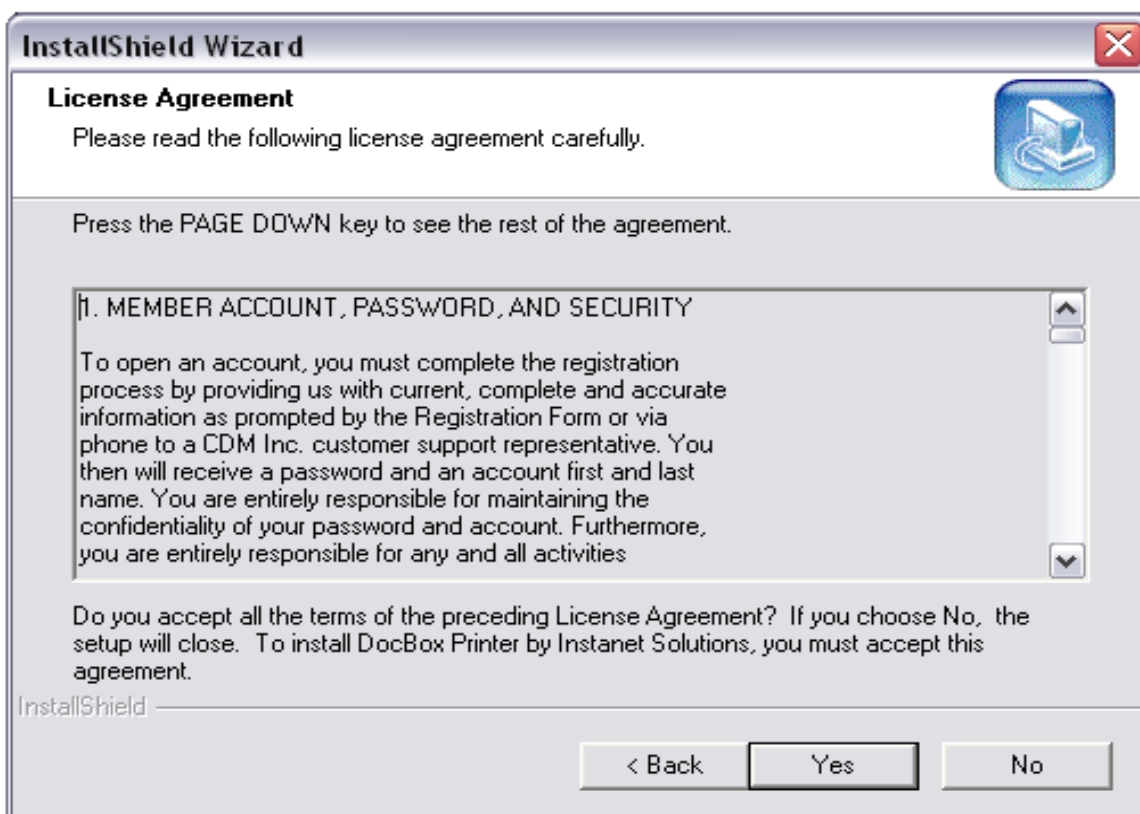
- When prompted, click the 'Run' button.
- Click the 'Run' button again when prompted.



User Guide

Installing the Software

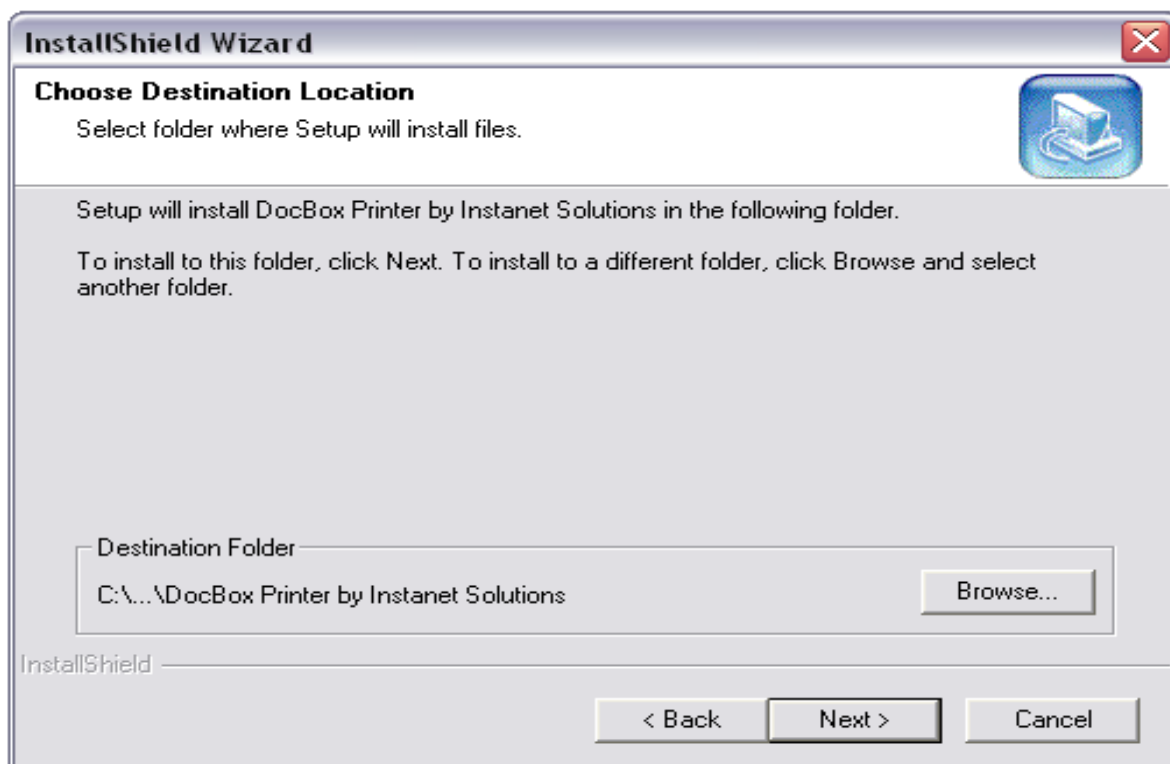
- Please read the License Agreement carefully.
- Click the 'Yes' button to continue.



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Installing the Software

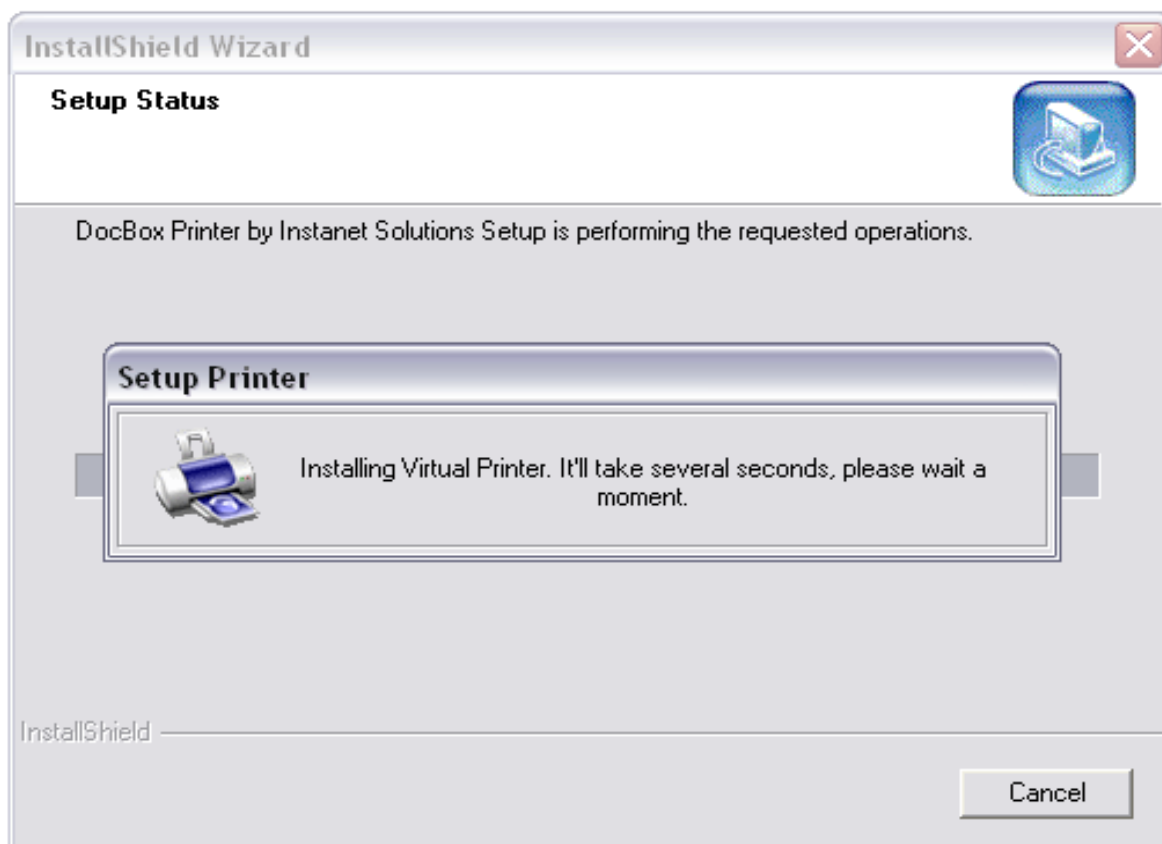
- Click the 'Next >' button.



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Installing the Software

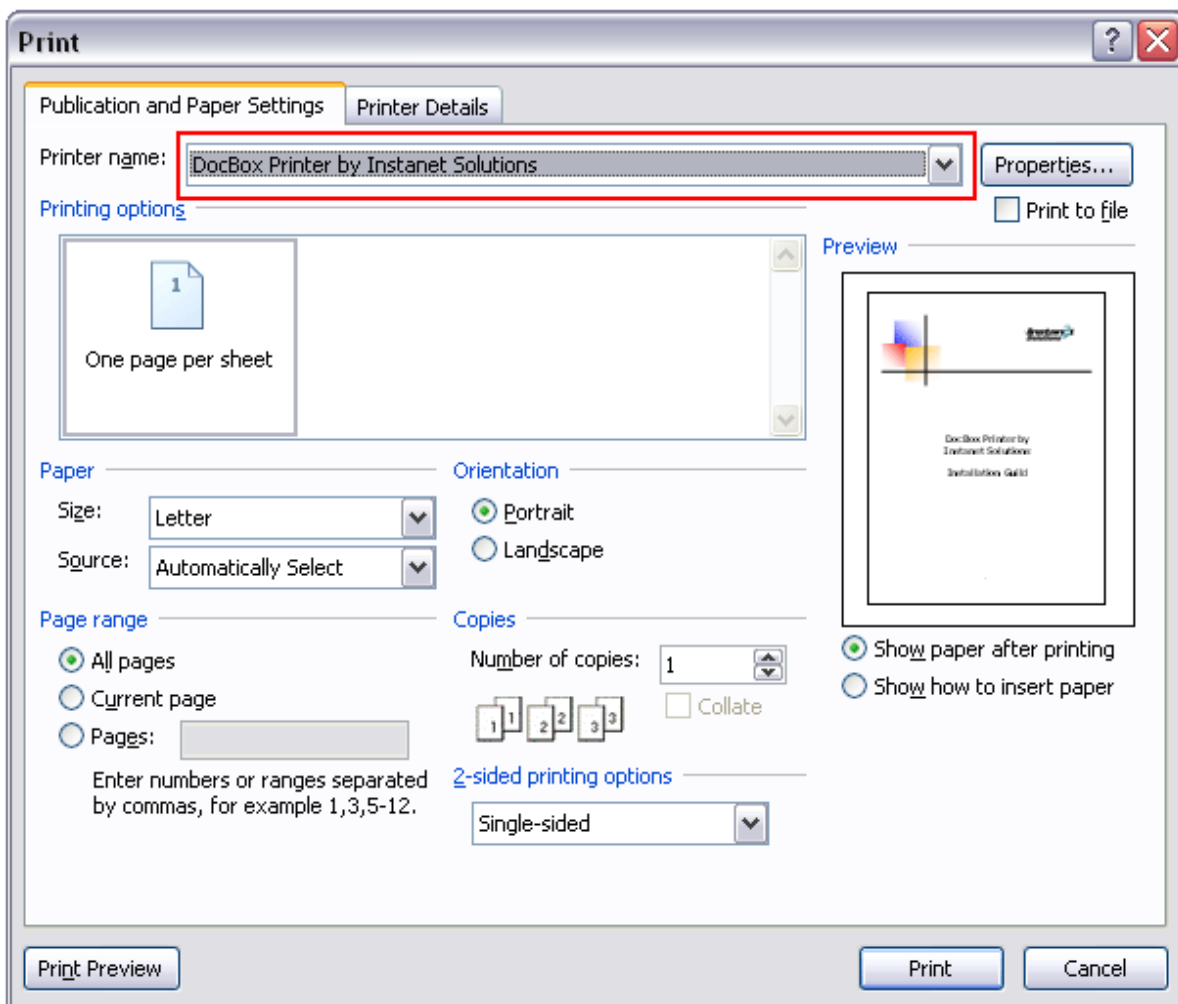
- Once the installation process has completed the window will close.
- The software is now ready to use.



User Guide

Configuring the Software

- To begin using the software, simply open a document to print, email and/or fax.
- Select the 'DocBox Printer by Instanet Solutions' option from the 'Printer name' list.
- Click the 'Print' button.



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Configuring the Software

When using the software for the first time you will need to enter your 'User Key'. The software will remember your key for future use.

Please see pages 2-6 of this document for more information on setting your password and obtaining your User Key.



The image shows a Windows-style dialog box titled "Instanet Solutions Authentication Required". The dialog has a red close button in the top right corner. Inside the dialog, the text "Please enter your password to continue." is centered. To the left of the input fields is a small icon of a yellow key. There are two input fields: "User key:" and "Password:". Below the "User key:" field is a blue link that says "If this is not your name, click here.". At the bottom of the dialog are two buttons: "Continue" and "Cancel".

Print Driver Settings

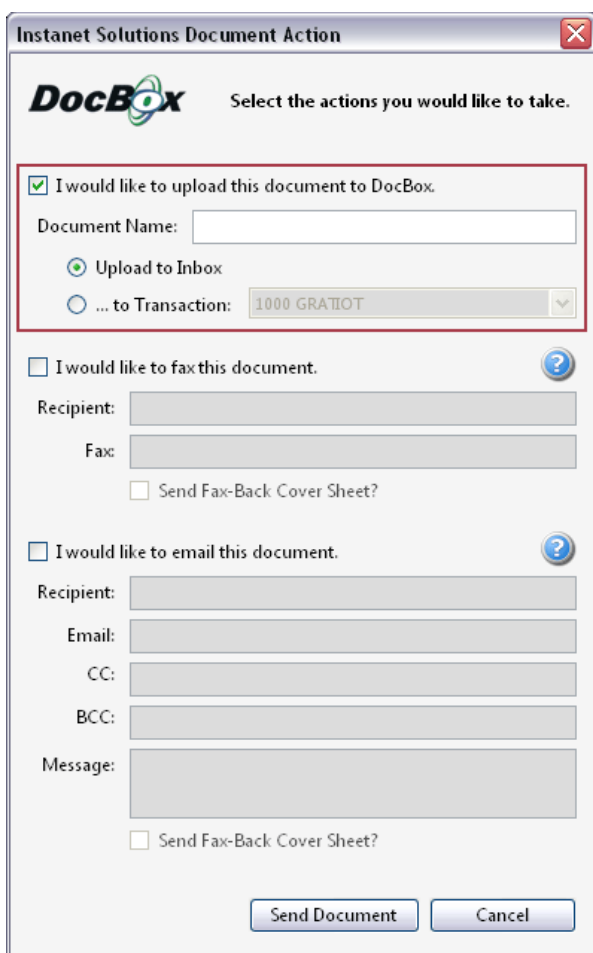
Before you are able to use the 'DocBox Printer by Instanet Solutions' you must first enable it within your account, as described on pages 2-6 of this document.

User Guide

I would like to upload this document to DocBox.

Uploads the document to your account.

- Enter the document's name.
- By default the document is placed in your Inbox.
- You can select a Transaction folder instead.
- Click "Send Document".



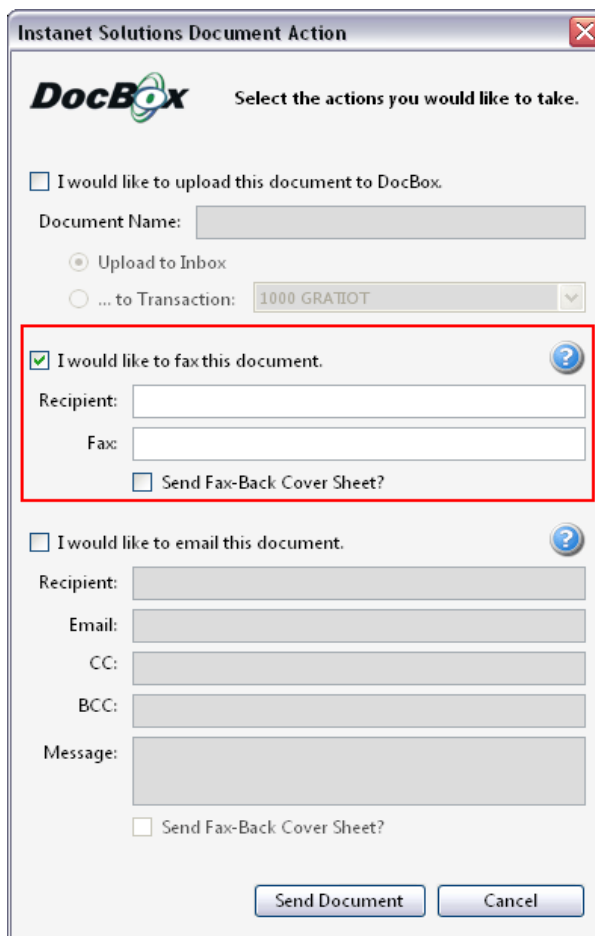
The dialog box is titled "Instanet Solutions Document Action" and features the DocBox logo. It contains three main sections for document actions, each with a checkbox and a help icon. The first section, "I would like to upload this document to DocBox," is selected and highlighted with a red border. It includes a "Document Name:" text box, radio buttons for "Upload to Inbox" (selected) and "... to Transaction:" (with a dropdown menu showing "1000 GRATIOT"), and a "Send Fax-Back Cover Sheet?" checkbox. The second section, "I would like to fax this document," includes fields for "Recipient:" and "Fax:", and a "Send Fax-Back Cover Sheet?" checkbox. The third section, "I would like to email this document," includes fields for "Recipient:", "Email:", "CC:", "BCC:", and "Message:", and a "Send Fax-Back Cover Sheet?" checkbox. At the bottom are "Send Document" and "Cancel" buttons.

User Guide

I would like to fax this document.

Sends the document via fax.

- Enter the recipient's name and fax number.
- Including a Fax-Back Cover Sheet is optional.
- Click "Send Document".



The image shows a software dialog box titled "Instanet Solutions Document Action". It features the "DocBox" logo and the instruction "Select the actions you would like to take." There are three main sections for document actions:

- Upload to DocBox:** An unchecked checkbox. Below it is a "Document Name:" text box. Two radio buttons are present: "Upload to Inbox" (selected) and "... to Transaction:" (with a dropdown menu showing "1000 GRATIOT").
- Fax:** A checked checkbox. Below it are text boxes for "Recipient:" and "Fax:". There is also an unchecked checkbox for "Send Fax-Back Cover Sheet?".
- Email:** An unchecked checkbox. Below it are text boxes for "Recipient:", "Email:", "CC:", and "BCC:". There is also a "Message:" text area and an unchecked checkbox for "Send Fax-Back Cover Sheet?".

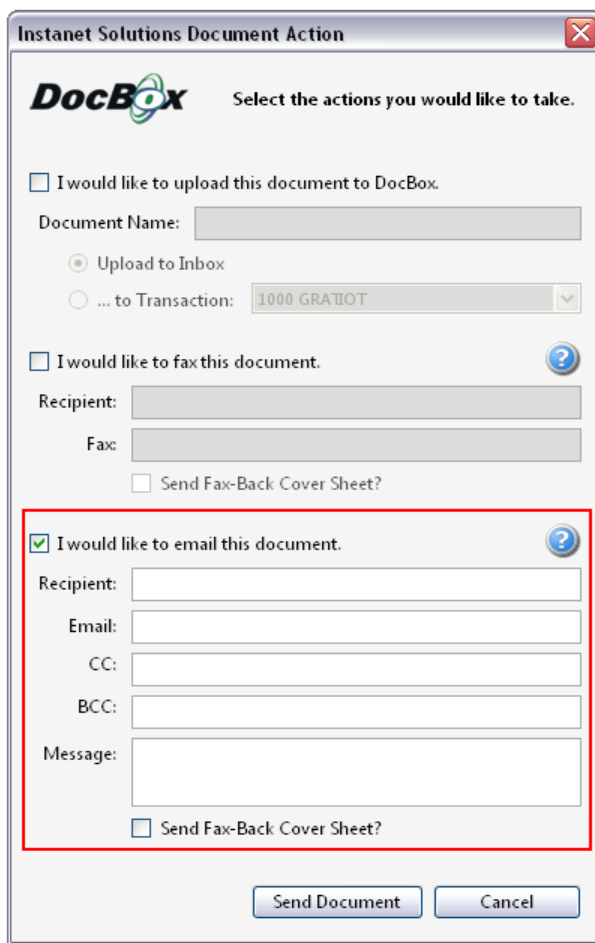
At the bottom of the dialog are two buttons: "Send Document" and "Cancel". A red rectangular box highlights the "Fax" section.

User Guide

I would like to email this document.

Sends the document via email.

- Enter the recipient's name and email address.
- Add a message.
- Including a Fax-Back Cover Sheet is optional.
- Click "Send Document".



Instanet Solutions Document Action ✕

DocBox Select the actions you would like to take.

I would like to upload this document to DocBox.

Document Name:

Upload to Inbox

... to Transaction:

I would like to fax this document. ?

Recipient:

Fax:

Send Fax-Back Cover Sheet?

I would like to email this document. ?

Recipient:

Email:

CC:

BCC:

Message:

Send Fax-Back Cover Sheet?