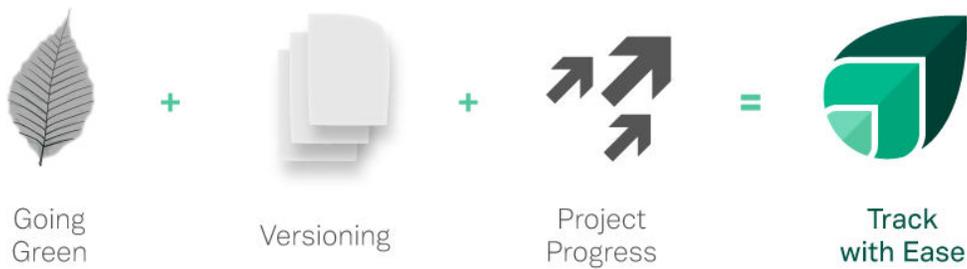




Track With Ease

Complete Tutorial



*Save Time & Gain More Clients, With
Track With Ease!*

Professional Account Tutorial

Setting Up An Account

Go to trackwithease.com; select “Try TWE for Free”, put in your details for a Professional Account by filling in the following details: your First and Last Name, Email Address, a unique Password, and Phone Number. Once you click “Register Now” you will be taken to the Dashboard where you can then add your company. Click on the “Add Company” button underneath Your Companies on the left hand side. This will take you to the Company Profile Page which will allow you to make all your company edits as described below in “Add/Edit Companies”.

Add/Edit Companies

Under “Companies”, you have the ability to enter various details of your company for your clients to constantly see, as well as set up your administrators. If you put a Company Name after registering and using the “Add Company” button, that company will be in your account already. If you did not, you can create one by clicking “Create a New Company” and go through the same process.

The first sub tab is “Company Information”. In here, there are options to add your Company Logo and a Banner Image that will be posted on the top of all pages. Also on that banner there will be links to your Company Website and all Social Media links that will provide you or your business Search Engine Optimization (SEO) branding when guests visit your links. Further, you can add a 140 description of the business, what you offer, or your mission statement that all clients and partners will see ALL the time!

The second sub tab is “Company Admins”. These are users we call “Administrators” (referred to as “Admin” for short in TWE) that you can add to your company who will always see everything that happens and who has the same abilities as you throughout the program so you don’t have to worry about notifying them. They may be your assistant, paralegal or office manager who usually does most of the busy work on your transactions. To add an admin, simply click “Add Administrators”, enter their email address, and click “Invite”. Remember, if you are new to TWE and don’t have contacts imported yet, make sure you put the email address in the second text area to properly add them.

You can always get back to this company page by clicking on the “My Account” button on the top right of your screen.

My Account:

The “My Account” tab allows you to change your avatar from your initials to a picture and add your Social Media links, plus change your password, if needed. You can always get back to this page by clicking on the “My Account” button on the top right of your screen.

Add/Import Contacts

You also have an area to keep track of all your Contacts via the Live CRM. Under the “Contacts” tab, click “Add People”. You may manually add email addresses, upload a contact list, or sync your Gmail contacts. You can always get back to this page by clicking on the “My Account” button on the top right of your screen. Please note when adding these contacts, they are NOT invited to TWE, nor are they associated with any of your tracks. To add people to Tracks, see the “People” section after setting up a track.

Upper Tool Bar

Across the site visible on every screen is the Tool Bar where you will find from left to right

1. **TWE Leaf:** this takes you to the Track With Ease website landing page where you can see the features, testimonials, about us, and resources.
2. **Tracks:** this takes you to the Tracks page of the Company you were last working in. If you haven’t been working in one, it will take you to the Dashboard with all your companies listed where you can choose which one to view their tracks.
3. **Dashboard:** this takes you to all the Companies you are associated with, whether they be yours or ones you’ve been shared on.
4. **Need Help:** this takes you to the Help section that has the written and video tutorials.
5. **Switch Company:** this allows you to quickly switch working between all companies rather than go to the Dashboard.
6. **Notifications:** these, like Facebook, are notifications that detail everything that happens across all your tracks in one place.
7. **My Account:** this takes you to your account page where you can add/edit your contacts and companies.

Tracks Dashboard

The Tracks Dashboard for your Company is a high level sneak peak of all transactions that you currently have Active for your business. The Left descending toolbar allows you select the Track Folder you wish to focus on, whether its Purchasers, Sales, Finances, whatever you have created. You will notice that the Dashboard will list all the Track Names and within each track display extremely pertinent information for your Business: The date the Track last updated, the amount of documents, the amount of open tasks, the next milestone due date; importantly Milestones with the date appearing in RED mean they have met their

due date and have gone unattended to draw your attention to it and finally, the Project Progression Meter telling you how far along your transaction is to completion.

NOTE: Scrolling over a milestone displays a pop up with the actual description of what the next important milestones is so you don't actually have to go into the Track to see what's next!

NOTE: The Top right of the track displays an orange folder that will drop down a menu where you can move the Track with a select folder for better organization

Create New Track

In the Tracks Dashboard, click the "Create New Track" button. Enter the Name of the Track and in the same Screen Assign that Track to a Track Folder (ex: Sales, Purchases, Litigation), if the Folder is not present simply create it with the "Add New Folder" button. When done click "Add Track".

Once you click on a Track, you will see to the right of the Track Name the symbols to "Rename", "Archive", and "Delete" the Track. When you click "Archive", you can make the track Inactive for however long you choose, and it will be saved under "Archived Tracks" until it is purged after the time you selected or until such time you restore it, making it and all its documents active again. Clicking "Delete" will permanently delete the track. Unlike archiving, you won't be able to restore anything from that track.

Also on this page underneath the track name, you will see a few different tabs: Activity, Documents, Milestones, Tasks, Calendar and People.

When setting up your Track for the first time, it is best to go to the People tab first to add your clients and set up the groups; the rest of the tabs will be explained after People

People Tab

This is where you can add People to the track. Once they log in and enter their contact details, it will display for the file CRM use their name, email address, telephone number, social media links, the date of their last activity, how long they have been a member in Track With Ease and what actions can be taken towards the Guest.

Remember, your Administrators will show up in all of your Tracks since you added them to your Company as an Admin. They have the ability to do everything the owner does.

To add people to the Track very easily, select the "Add or Invite People" Button. The invite page will open whereby the Owner can:

- a. Create a Group for the Guest to be added to. NOTE: You MUST have a Group created or selected to add Guests to.

- b. Simply search the person(s) and select to add them to the Track. If they are not in your Contacts, you can manually add the email addresses at the bottom of the screen as explained on screen.
- c. Once you have selected or manually added the email addresses of whom you want to invite to a particular group press the “Invite” button; a screen will appear at the top for 5 seconds indicating the successfully added people to the Track!

The Left Side of the Screen will detail all the Groups plus Invitees that are a part of this Track.

The Owner at any time can Move people within Groups on the Track and/or Delete them from the Track.

NOTE: You don't have to WAIT for people to accept the invitation to the Track to start sharing with them on TRACK WITH EASE. Their Avatar just their first initial will appear on all Permission Screens throughout the Program until such time that they accept the Invitation. Whenever they do accept, their First Initial will become their Full Avatar whether their full initials or their picture. Anything shared with them before they join the Track will appear on their Track With Ease page once they join the Track saving you the OWNER the work or having to go back in an re-share items with Guests once they join the Track.

Activity Tab

Activity shows you all the happenings on a given Track for the Life of Track, it's your live feed lifeline of what transpiring on the Track with all guests; who and when a document was uploaded or viewed, a comment made, a task created, a milestone created, or calendar event added. A unique feature on this page is the user's ability to post a General Comment for all to see across the Track and respond to driving an interface conversation on your matter in real time, just like Facebook (ex: When is the closing date Sir?), general comment notifications are received via a nice succinct email template to All Guests on the Track

NOTE: General Comments are permissioned as to who can view, so the ADMIN can select people in or across groups to view the comment.

Documents Tab

Once you go to the Documents Tab, you will see Documents and Folders. You can create folders and sub folders that will be shared to Invitees to organize your files. To upload a document, click “Upload Document”, drag and drop a file(s) or browse to find the file(s) on your computer. Many common document and picture formats can be added to this screen where they will convert to PDF upon completion. Once the document(s) reaches

completion as per the Progress Upload Bar at the top right, they will appear in descending order where you can administer them in various ways as follows:

- a. Change the Document Name and click “Who can see this document” button which allows you to select individually or as a group the guests that will be able to view this document.
- b. Select a Folder to input the document to, if the folder does not appear, you can simply create it on this screen with the “Add New Folder” button. (Ie: Contracts Folder)
- c. Add a special comment to the document (ie: Can you please review clause 1, 3, and 5), then administer in the “Who can see this comment” button, which guest(s) you would actually like to be able to see this comment on their Track.
- d. Add a description to the actual document to explain it to all parties (ie: This is the final Contract of sale agreed by all parties)

This process can be repeated for each individual document uploaded on this screen and once finished, click the “I’m done uploading documents” orange button at the bottom right. TWE will take it from there, uploading all the documents, administering your set permissions, and notifying all parties via a unique email what has been uploaded and with the special comments.

If you upload a multiple set of documents that you want to administer at one time, use the “EDIT ALL DOCS”. From that link you can administer “Who can view these documents” and select the folder you would like to place all of these document in, if any, from the “Select folder” button.

Very importantly, you can upload as many documents as you like at one time and share with Guests without them getting bombarded with notifications for each document separately. TWE will very nicely send ONE concise email detailing all of the documents uploaded including comments and allow the guest to click on those documents individually to open and work with in their browser.

Upon Upload Completion and the documents appearing on the Documents Page you have many options:

- a. move, copy, delete, set access to or archive the individual document by clicking the box icon to the left of the document.
- b. You can also administer the above options across all documents by checking off which documents you would like to select
- c. Note: when using the Set Access Panel, already-set permissions on documents is not disturbed, you can simply add more people or remove people from the document as you wish.

Options Button: Within each document, owner of the document (and as always, Owner and Admins) has a few options:

- a. Upload a New Version: This will replace the old document with the new one, but still allow the older version to be viewed in the Document Viewer Panel Screen when you click on the Actual Document.
- b. Edit Document Name: You can change the Name of the document.
- c. Edit Document Description: You can add or change a description of the document.
- d. Email Document: You can email the document to a User outside of the Track.
- e. Archive Document: You can archive this specific document for future reference for any period you desire.
- f. Change Permissions: Any anytime you can Add or Remove Guests from a Document.

Upload Date: Is the date it was uploaded to the Track and can be clicked on to go from descending to ascending order.

Tasks: Shows you if any document has Tasks related to it and should the Task Number be in GREEN that means the Task is related to that User personally.

Owner: Is the Person who uploaded the document to the Track.

Who Can View: Details the parties that can view the document which the Administrator has total control over setting.

Note: When a Guest uploads a document to the Track, only the Owner/Administrators see the document(s) initially. At that point, they have the permission rights through the Option button to share the document with other interested guests. With TRACK WITH EASE the Owner of the Track is always in TOTAL Control as to who can see what within a given transaction!

Document Viewer

Once you click on an uploaded document a New Screen will open with the actual document for review and comment. The Top Toolbar still allows the user to: Go To the Overall Track, See the Dashboard, See Notifications (Live) and Upload a New Version of the document.

You have many options with this one-of-a-kind viewer, via the toolbar right above the document to do the following:

- a. Select the left tab icon and see all pages of the document on the left in descending order and go directly to a page of interest.
- b. Select the Magnifying glass icon to search a keyword on the document.
- c. Select the Up and Down Icon to scroll through the pages of the document.
- d. Select Zoom to make the document larger or smaller for easier view.
- e. Select the Print Icon to print the document on your local or network printer.

- f. Select the Down Arrow to Download the document in its actual native name format as a PDF to your computer.
- g. Select the Right Arrow Icons brings down a Menu where the user can go immediately go to the first or last page of the document, rotate the document, enable the hand tool and see the document properties.

Document Viewer COMMENT & TASK Feature!

a. Users reviewing the document can go to specific lines on the document and click their mouse button, whereby a green button will appear, scrolling over that button brings a screen where they can write a comment or question (IE: change the change the date of this closing)

NOTE: After you click the “Post” button, a screen appears: Your comment was posted, currently only administrators can read and respond to this comment, would you like to set user access for this comment now?

The Owner can permission any Individual or Group across the Track to view a comment they post on a document.

a. The Guest is only allowed to set permission for other members of their Group (ie: Group: Realtors) to view the comment posted by the Guest.

b. Guests can also POST Comments on Right Ledger of the document and not necessarily on the document itself.

c. Tasks: Guests can set up tasks that relate to this specific document by selecting “Add New Task” from the Task Ledger on the Right Side of the Page.

Milestones:

The Owner/Admin can set up Milestones for a given Track which identify events that occur in a sequence they set that take the file from 0 to 100% complete. As a Milestone is checked as complete the Project Progress Meter moves up that corresponding percentage. Track With Ease smartly will divide the amount of milestones created by themselves to create the percentages for completion (Ie: If you have 8 milestones, each one will represent 12.5% to completion (100%/8)

To Create a Milestone click “Add Milestone” from there the Owner can Create a Milestone Title, Describe the Milestone, Create a Due Date in the Future or have the Program Calculate the Due Date from the Present Date (this is a such a useful feature for those in industries where dates going forward need to be calculated from the present date)

There is NO Permissions on this screen, all guests are able to view all Milestones for the Transaction on their Track

NOTE: Milestones once created can be dragged and dropped into any order for convenience.

Tasks:

The Owner/Admin can set up Tasks for any Guest(s) on the Track. To do so, simply select the "Add Task" Button and the Task Creation window will appear, from here you can:

- a. Give the Task a Title.
- b. Describe the Task with some detail.
- c. Assign the Task to a Guest on the Track and if desired tie the Task to a specific document the Guest is shared on with the Track (ie: Create task for Angelica and it relates to the Contract of Sale).
- d. Set a Due Date for the Task or calculate one for a future date.
- e. Allow others in the Track even in different groups to see the Task for this Guest.

Once completed the Guest receives a very clean and neat email notification.

Show Task For: This Panel to the left allows the Owner to click on the Avatar of the individual they wish to see the Tasks for or they can use the ALL Tasks to see everyone's tasks.

Calendar

The Owner/Admin can set up calendar events that can be shared with anyone on the Track. To do so, simply select the "Add to Calendar" and the Add Event screen will appear, from here you can:

- a. Give the Event a Title.
- b. Describe the Event in detail
- c. Set a Due Date or calculate a Due Date for the Event.
- d. Select who can view the calendar event across groups.

The calendar operates as an overall look of all items including Milestones, Tasks and Events for the Track, all items will appear in Orange on the left side of the Calendar.

You can also see all events in descending order of the Calendar from the "View All Events" tab on the Calendar Screen.