Specify Yourself as a Broker Reviewer

Summary

Describes how to set up the user accounts to receive notifications about documents ready for review, and to have the correct permissions to review and approve or reject documents.

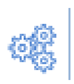
Context

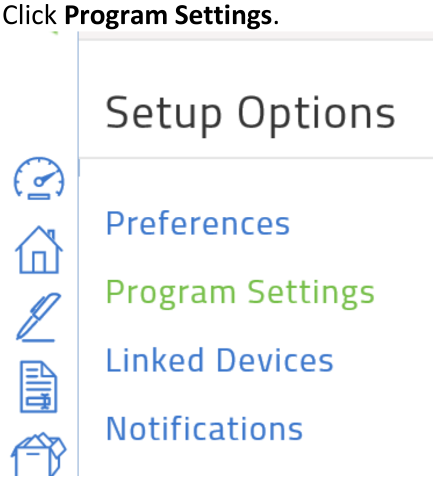
TransactionDesk provides a workflow to allow one or more users to review and approve documents that are attached to transactions. Before a user can approve or reject documents, they must first be set up as a broker reviewer.

Before You Begin

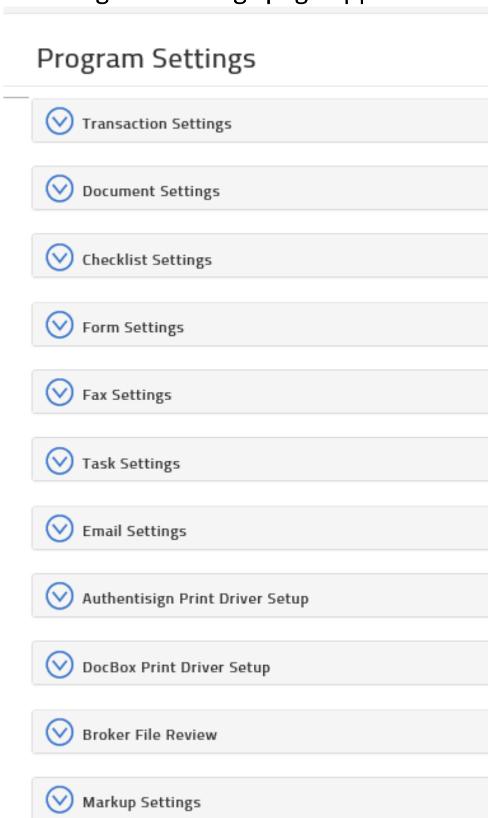
You require super user (broker) access to TransactionDesk to perform this task.

Steps

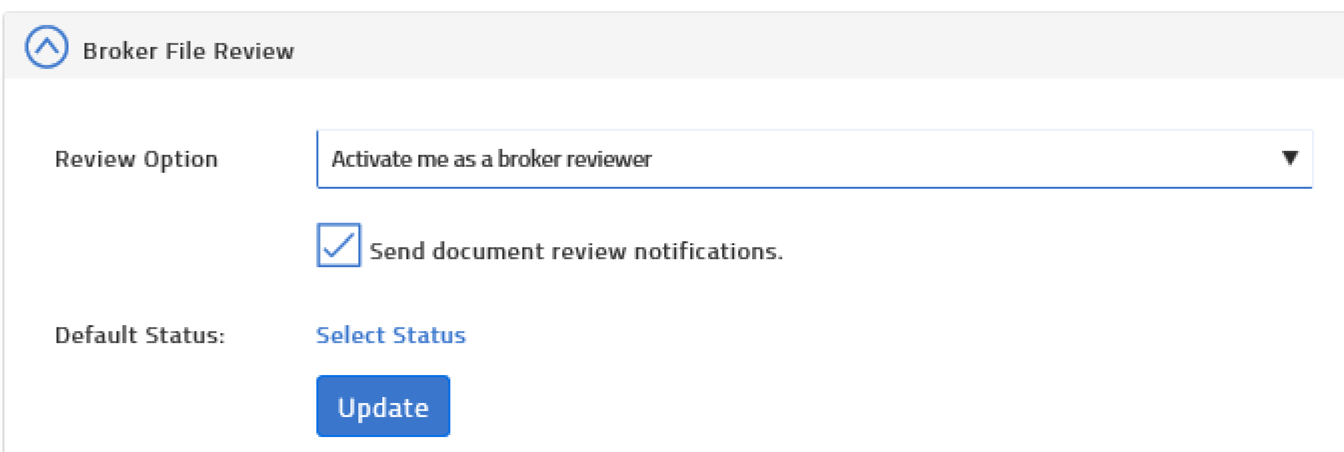
1. Log in to TransactionDesk as a super user.
2. Click Setup .
3. Click **Program Settings**.



The Program Settings page appears.



4. Click the arrow next to **Broker File Review** to expand the options.



5. Use the **Review Option** dropdown to select **Activate me as a broker reviewer**.
6. Check **Send document review notifications** so that you are notified when a document is ready for review.
7. Click **Update**.