

TRANSACTION DESK BASIC



A L I G N E D A X I S
VISION | EXECUTION | RESULTS

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Transaction Desk Basic

#1: NAVIGATION

*This section will get you familiar with **how to navigate** Transactions.*

1. Logging in and Accessing Areas of Help
2. Customizing the Dashboard
3. Tour of the Platform and Navigation Bar
4. Forms Library and Documents
5. Establishing Settings/Branding
6. Setting up Notifications

#2: CREATE TRANSACTIONS

*This section will show you how to **create and manage** a Transaction.*

1. Transaction Navigation Bar
2. Create a Transaction
3. How to add Contacts
4. How to add Forms & Documents
5. How to create a Checklist & Tasks

#3: CHECKLISTS & TASKS

*This section will show you how to **create and manage** Checklists & Tasks.*

1. Create a Checklist Template (*Superusers*)
2. Set Dates & Assignees
3. Attaching Documents for Broker Review
4. Completing Items from the Tasks Widgets

#4: TEAMS/SHARING

*This section will demonstrate how to **add a team and/or share a transaction**.*

#5: LINKED APPLICATIONS


*Describes how to **download, install, and activate** the **TransactionDesk App** on a mobile device.*


Transaction Desk Basic #1


CUSTOMIZE YOUR AGENT DASHBOARD

TransactionDesk Edition dashboards are all customizable. You can add the widgets that give you quick access to the information you need, and remove any widgets you do not care about.

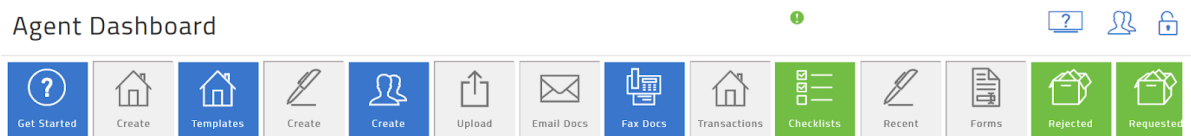
Note: Adding or removing dashboard widgets does not add or remove transaction or other information. It only controls what information is visible on the dashboard itself.

1. Navigate to the dashboard by clicking the dashboard icon .
2. If you are logged in as a broker, and the title Agent Dashboard is displayed, click the view

icon  to switch to the Agent View.

3. Click the lock icon  to unlock the agent dashboard widgets.

The widget tray opens. You can drag and drop widgets onto the dashboard as desired.



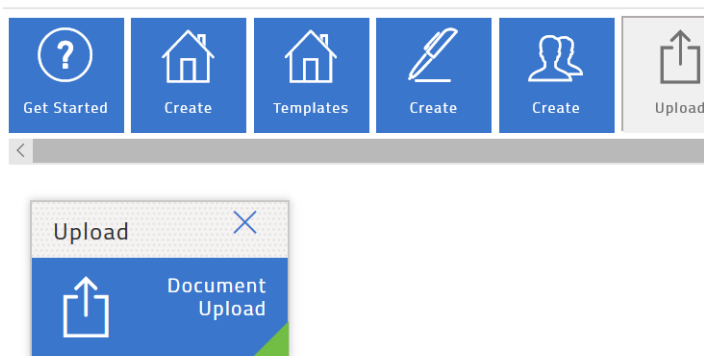
The **blue widgets** are **shortcuts**. The **green widgets** (to the right) provide at-a-glance **summaries** of information. You can use **as many of the blue widgets** as you like. You can use a **maximum of six of the green widgets** in your dashboard.

4. Review the available widgets and determine what information will be most useful for you to see in the Agent dashboard. For example, if you frequently upload documents, add the Document Upload widget to your dashboard.

ACTIVITY

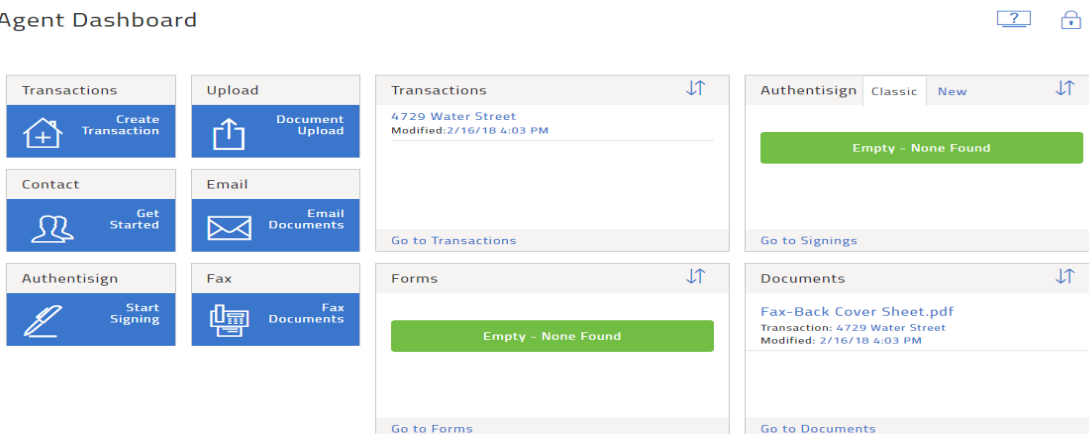
1. Drag and drop each widget onto the highlighted space in the dashboard. In the following example, the Document Upload (Upload) widget is added, to provide a shortcut to quickly upload documents to TransactionDesk.
2. Continue to drag and drop widgets until you see the key information you require in your dashboard. Be sure you select the widgets that will be most helpful to you.
In the following example, we added the Document Upload, Start Signing, and Checklists widgets in the dashboard.

Agent Dashboard

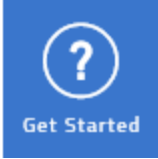


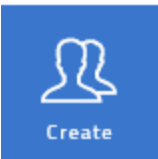





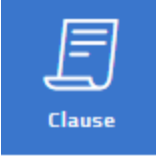

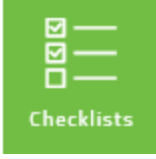


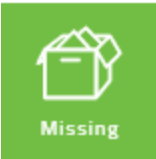
3. When you are finished selecting widgets for the agent dashboard, click the lock button to lock the dashboard configuration so you do not change it accidentally.








Agent Dashboard

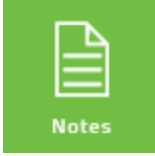


AGENT DASHBOARD WIDGETS


<u>Widget Name</u>	<u>Icon</u>	<u>Description</u>
Get Started (Support)		A shortcut to the Support page, where you can access support, training, videos, or documentation.
Create Transaction		A shortcut to create a transaction.
Start Signing		A shortcut to create a new signing.
Create Contact		A shortcut to create a new contact.
Document Upload		A shortcut to upload documents to a transaction or an inbox folder.
Email Documents		A shortcut to email one or more documents to a recipient email address.

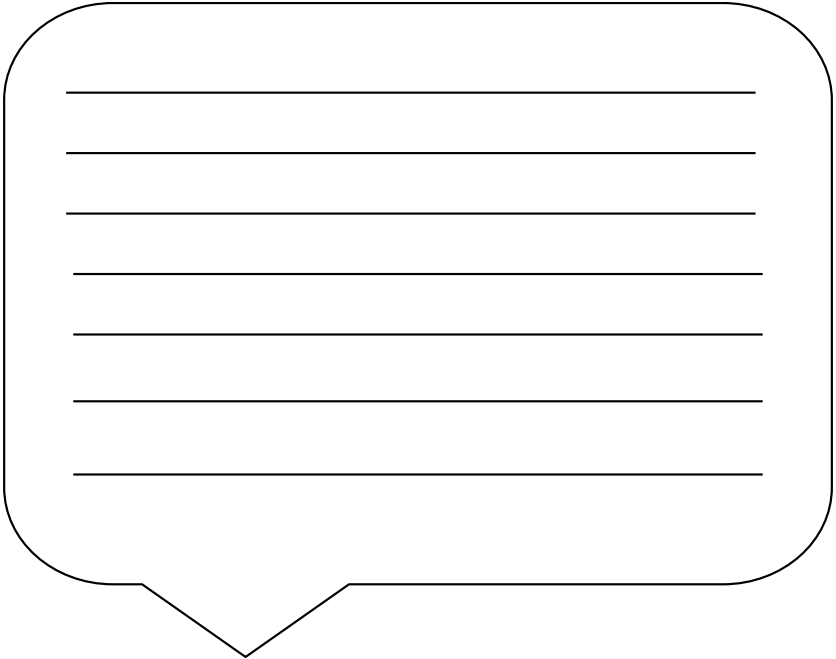
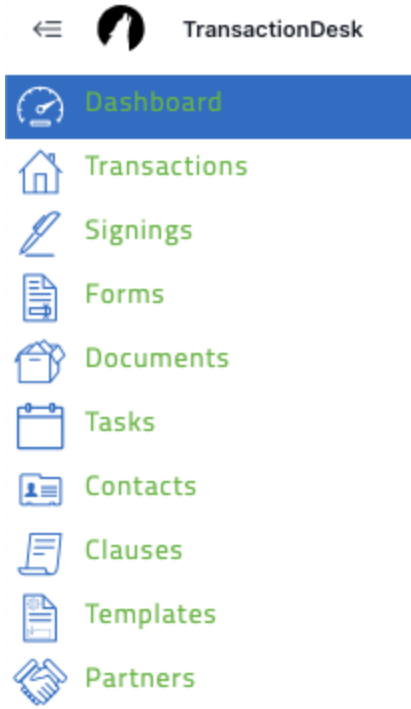
<p>Fax Documents</p>		<p>A shortcut to fax documents or forms.</p>
<p>Clause</p>		<p>A shortcut to create a new clause.</p>
<p>Transactions</p>		<p>Provides a summary list of the agent's transactions. Click on a transaction name to view the transaction. The widget also provides a shortcut to the list of all transactions.</p>
<p>Checklists</p>		<p>Provides a summary list of each of the agent's transactions that have checklists, and the percentage completion of each checklist. Click on the name of the transaction to view the transaction.</p>
<p>Recent Signings</p>		<p>Provides a summary list of the agent's recent signings. The status of each signing is displayed. If the signing is associated with a transaction, the name of the transaction is also displayed. Click on a signing name to view the signing. The widget also provides a shortcut to the list of all signings.</p>
<p>Forms</p>		<p>Provides a summary list of the agent's forms that are in progress. Click on the name of a form to view the form. The widget also provides a shortcut to the list of all forms.</p>
<p>Missing Documents</p>		<p>Provides a summary list of the agent's checklists that are missing their associated documents. Each item in the list displays the transaction the checklist is a part of. Click on a transaction name to view the transaction.</p>

Documents		<p>Provides a summary list of all of the agent's documents. By default, the documents are listed with the most recent changes at the top of the list. Click on a document name to view the document. The widget also provides a shortcut to the list of all documents.</p>
Overdue Tasks		<p>Provides a summary list of overdue tasks assigned to the user. The due date for each task is listed. Click on a task name to view the task. You can edit the task directly from the widget. Provided the task is not mandatory, you can also delete the task from the widget. Mandatory tasks have a red M symbol  next to the task name in the widget. The widget also provides a shortcut to the list of all tasks.</p>
Tasks		<p>Provides a summary list of all of the agent's tasks in all of the agent's transactions. The name and due date for each task is listed, followed by the name of the transaction it is part of. Click on a transaction name to go to the transaction dashboard. Mandatory tasks have a red M symbol  next to the task name in the widget. You can edit the task directly from the widget. Provided the task is not mandatory, you can also delete the task directly from the widget. The widget also provides a shortcut to the list of all tasks. You can sort the list of tasks by due date, date created, or last modified date.</p>
Completed Tasks		<p>Provides a summary list of completed tasks for the agent. The due date for each task is listed. Click on a task name to view the task. The widget also provides a shortcut to the list of all tasks.</p>
System Messages		<p>Provides a summary list of system messages. These messages include updates about TransactionDesk including new features and any announcements about the application. Messages</p>

		remain in this list until you open them and mark them to not show again.
Notes		Provides a summary list of notes added to the agent's documents. The name of the user who created the note is displayed, followed by a preview of the note, followed by the name of the transaction the note applies to, and the date and time the note was modified. Click on the transaction name to view the transaction.

TOUR OF THE PLATFORM & NAVIGATION BAR

To expand the navigation bar, click on the menu found on the top left.  TransactionDesk



FORMS LIBRARY AND DOCUMENTS

FORMS

A list of the forms in the library can be found on TNrealtors.com → Forms on the Fly. You can also find a form by searching by a form number or a form name in the **Search Bar**.

CF = Commercial

RF = Residential

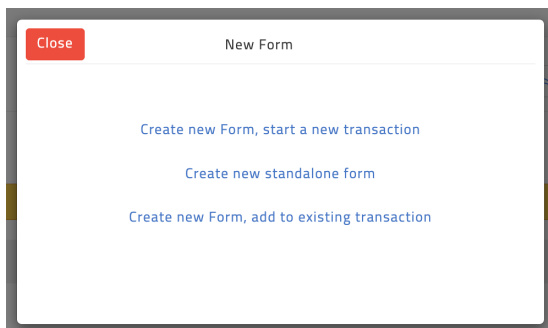


ACTIVITY

1. Search for the *RF 401 Purchase and Sale Agreement* by typing **401** and **Purchase**.

How can you see yourself searching for the form you're looking for?

2. Click on the hyperlink labeled RF 401 Purchase and Sale Agreement (*make sure you are selecting from the 2023 TAR Residential Forms*).



A pop-up window will appear with 3 options:

1. **Create new form, start new transaction**
2. **Create new standalone form**
3. **Create new form, add to existing transaction**

Click on each link and explore what happens.

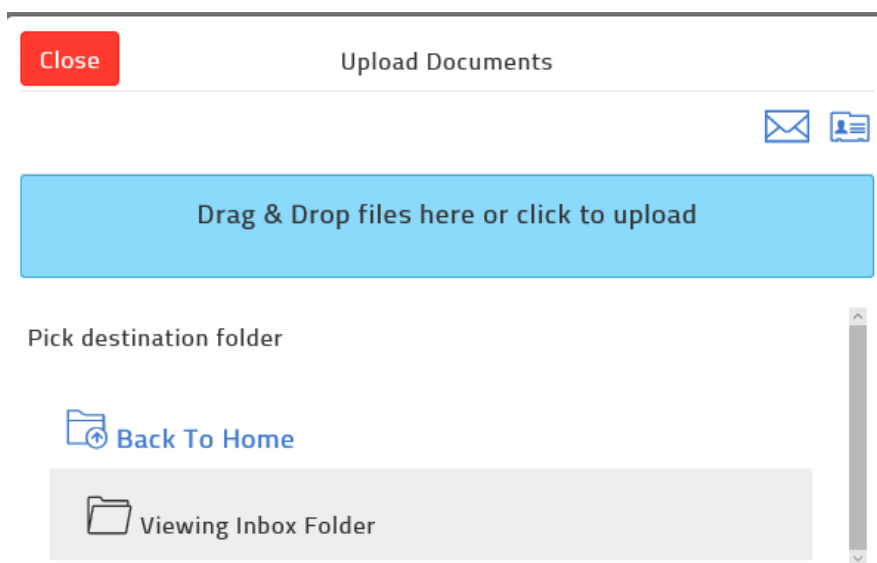
If you are uncertain if the form selected is the correct one, you can **Preview** the form by clicking on the menu in the form line. This menu also provides access to create a **New** form option, like the steps provided in the last exercise. A **Download** option is also available if you'd like a blank document, or you can **Print** a blank document.



DOCUMENTS

If you want to load a document into TransactionDesk, but not associate it with a transaction at this time, you can upload it to the Documents folder.


1. Navigate to your dashboard.
2. In the **Upload widget**, click **Document Upload**.



3. Click **Back to Home** and navigate to the folder where you want to upload the document.

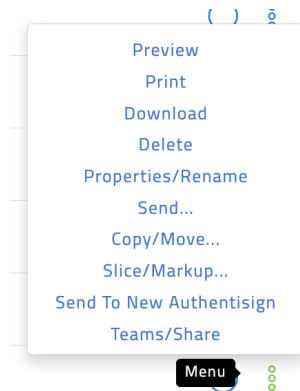
ACTIVITY

Uploading a File:

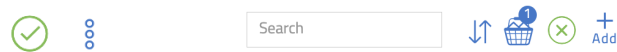
1. Drag and drop the file from your computer to the Drag & Drop files here area.
2. Click the blue bar to upload a file from your comp 

Finding the File Uploaded:

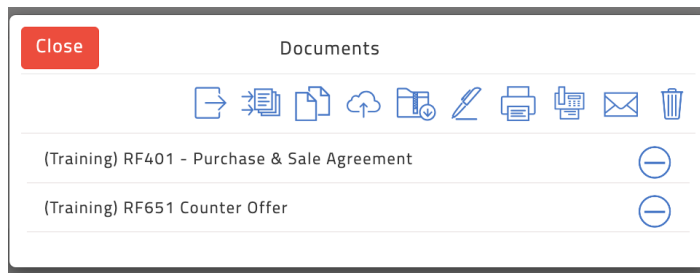
1. In the navigation bar, click on **Documents**
2. Select the folder you downloaded your file to.
3. Find the document from the list. Select the menu button to select what you'd like to do with the file.



4. You can also select the radial button. When selected a check mark appears and the document is added to the basket at the top of the page.



5. When you select the basket, you can do the following:

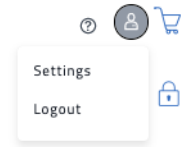


1. Move
2. Merge
3. Copy
4. Copy to Cloud
5. Download zip
6. Send to Authentisign
7. Print
8. Send via Fax
9. Send via Email
10. Delete

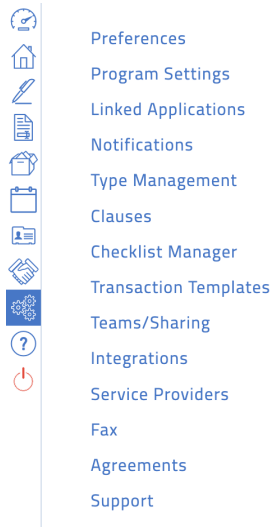
ESTABLISHING SETTINGS/BRANDING

TransactionDesk provides several general program settings that affect all users of the system. These settings define how users see and interact with documents, checklists, forms, faxes, tasks, and emails, and define the broker review process.

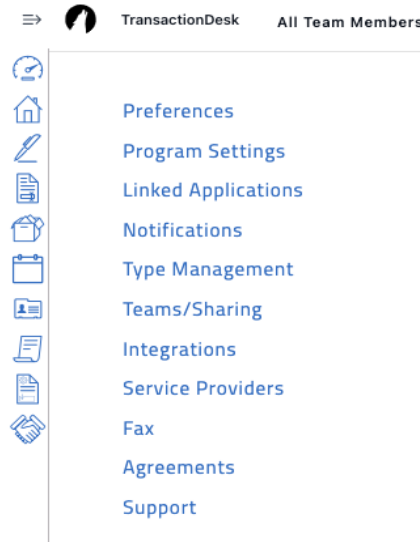
1. From the upper right corner, click **Profile**  and then **Settings**.



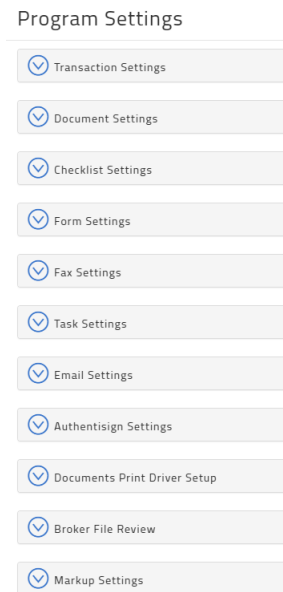
OLD SETTINGS



NEW SETTINGS




2. Click **Program Settings**. The Program Settings page opens.



3. To configure transaction settings, such as the default views, sorting, and display formats, and other transaction-specific settings for the entire office, expand **Transaction Settings**.

Program Settings

 Transaction Settings

Default View:

Default Sort:

Default Status: [Select Status](#)

Default Display:


Create Cover Sheet:

Use Wizard:

Enabled PDF Data Import: [What's This?](#)

See "[Transaction Settings](#)" below for detailed information about the transaction settings fields. When you have finished making changes to the transaction settings, click **Update**.

4. To configure the default transaction document settings, such as whether to sort them alphabetically, click **Document Settings**.

 Document Settings

Transaction Documents Default View:

Default Sort:

See "[Document Settings](#)" below for detailed information about the document settings fields. When you have finished making changes to the document settings, click **Update**.

5. To configure the default checklist view, such as whether to sort checklist items in a transaction alphabetically, click **Checklist Settings**.

Checklist Settings

Transaction Checklist Default View:

Drag and drop (default) ▼

Update

See "[Checklist Settings](#)" below for detailed information about the checklist settings fields.

When you have finished making changes to the checklist settings, click **Update**.

- To configure the default form settings, such as what field to sort on, fonts and colors to use, and whether to automatically save a copy, click **Form Settings**.

Form Settings

Default Sort:

Name ▼

Default Font:

Courier-Bold ▼

Default Color:

▼

Default Size:

9 ▼


Auto-save:

Create copy when emailing:

Update

See "[Form Settings](#)" below for detailed information about the form settings fields. When you have finished making changes to the form settings, click **Update**.

7. To configure the default fax settings, such as whether to include phone and fax numbers on cover sheets, and whether to timestamp and certify documents, click **Fax Settings**.

 Fax Settings

Show/Hide: Hide my phone/fax numbers from cover sheets

Auto-timestamping and certification of documents:

Enabled

Disabled


Current Primary: [1-888-895-6524](tel:1-888-895-6524)

Current Secondary: [1-719-434-9525](tel:1-719-434-9525)

[Visit store to purchase your own fax number](#)

See "[Fax Settings](#)" below for detailed information about the fax settings fields. When you have finished making changes to the fax settings, click **Update**.

8. To configure the default task settings, such as the default owner, default status, sort order, and whether to send a reminder, click **Task Settings**.

 Task Settings

Default Owners:

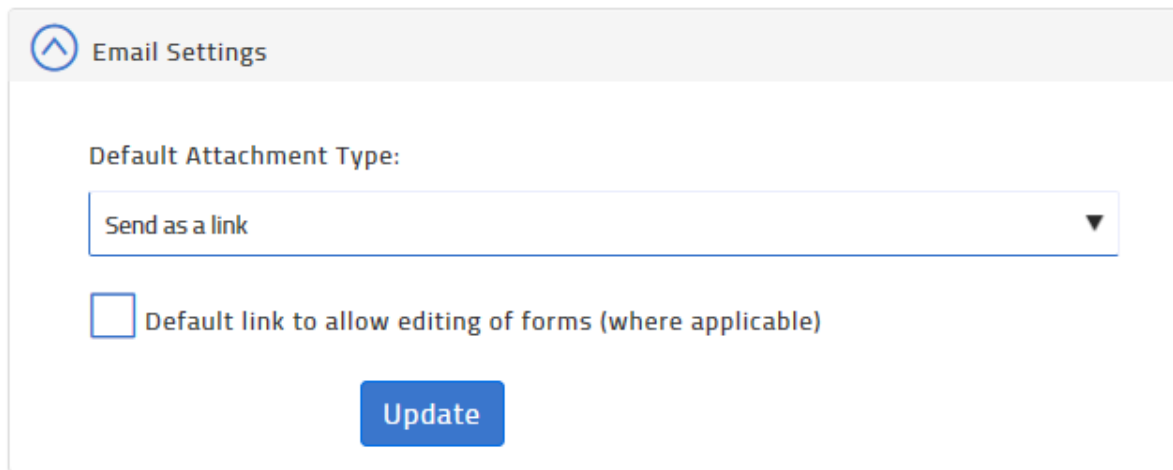
Default Status:

Default Sort:

Reminder:

See "[Task Settings](#)" below for detailed information about the task settings fields. When you have finished making changes to the task settings, click **Update**.

9. To configure the default email settings, such as how to send attachments, and whether to allow editing of attachments, click **Email Settings**.

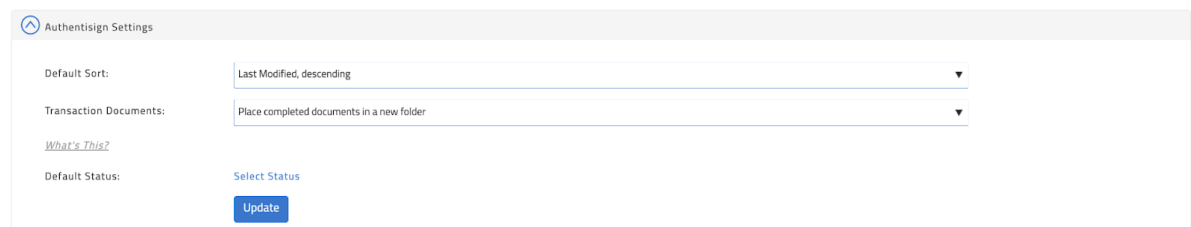


The screenshot shows the 'Email Settings' panel. At the top left is a back arrow icon and the title 'Email Settings'. Below the title is a section labeled 'Default Attachment Type:' with a dropdown menu currently set to 'Send as a link'. Underneath is a checkbox labeled 'Default link to allow editing of forms (where applicable)', which is currently unchecked. At the bottom center is a blue 'Update' button.

See "[Email Settings](#)" below for detailed information about the email settings fields.

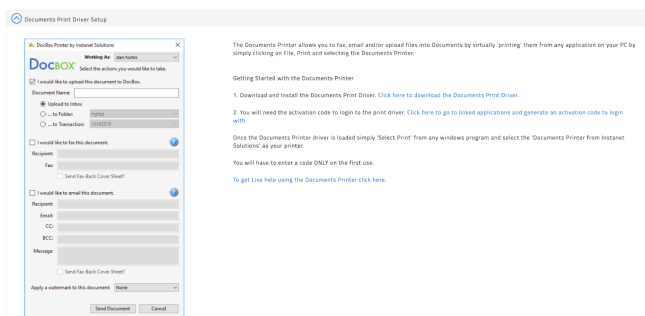
When you have finished making changes to the email settings, click **Update**.

10. To configure the default Authentisign settings, click **Authentisign Settings**. When you have finished making changes to the email settings, click **Update**.



The screenshot shows the 'Authentisign Settings' panel. At the top left is a back arrow icon and the title 'Authentisign Settings'. Below the title are three settings: 'Default Sort:' with a dropdown menu set to 'Last Modified, descending'; 'Transaction Documents:' with a dropdown menu set to 'Place completed documents in a new folder'; and 'Default Status:' with a blue link labeled 'Select Status'. At the bottom center is a blue 'Update' button.

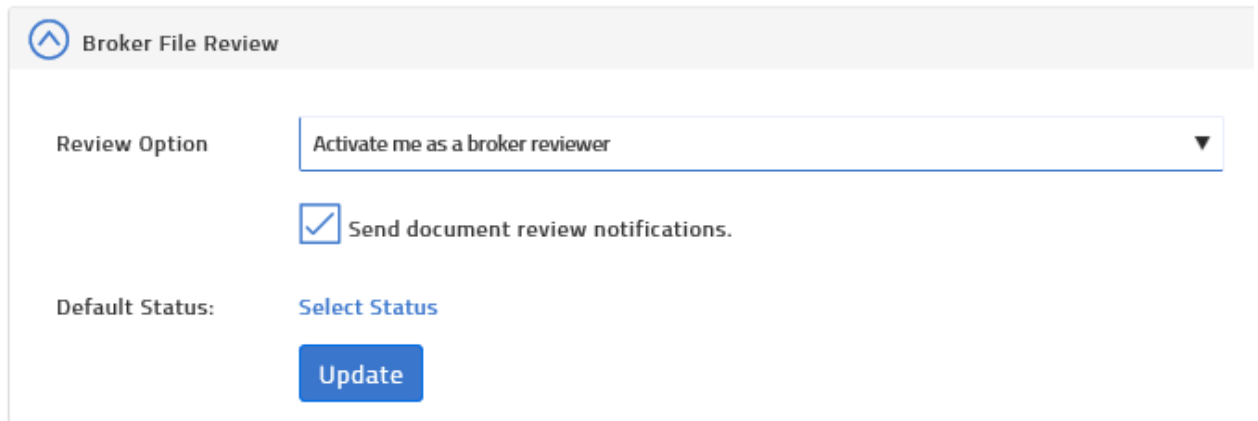
11. **Microsoft Windows Users:** To configure the Documents Print Driver Setup, to allow you to fax, email and/or upload files into Documents by virtually 'printing' them from any application on your PC by simply clicking on File, Print and selecting the Documents Printer, click **Documents Print Driver Setup**.



The screenshot shows the 'Documents Print Driver Setup' dialog box. On the left is a 'DocBOX' window with a 'Working Area' and a 'Send Document' button. The main area contains instructions: 'The Documents Printer allows you to fax, email and/or upload files into Documents by virtually "printing" them from any application on your PC by simply clicking on File, Print and selecting the Documents Printer.' It also includes a 'Getting Started with the Documents Printer' section with two numbered steps: 1. Download and install the Documents Print Driver. 2. You will need the activation code to light to the print driver. It also mentions that once the driver is loaded, users should 'Select Print' from any windows program and select the 'Documents Printer from Instant Solutions' as their printer. At the bottom, there is a 'Send Document' button and a 'Cancel' button.

When you have finished making changes to the email settings, click **Update**.

12. **PRINCIPAL/MANAGING BROKERS ONLY:** To specify if you are a Broker reviewer, Staff reviewer, or not a reviewer, and whether to receive review notifications, click **Broker File Review**.

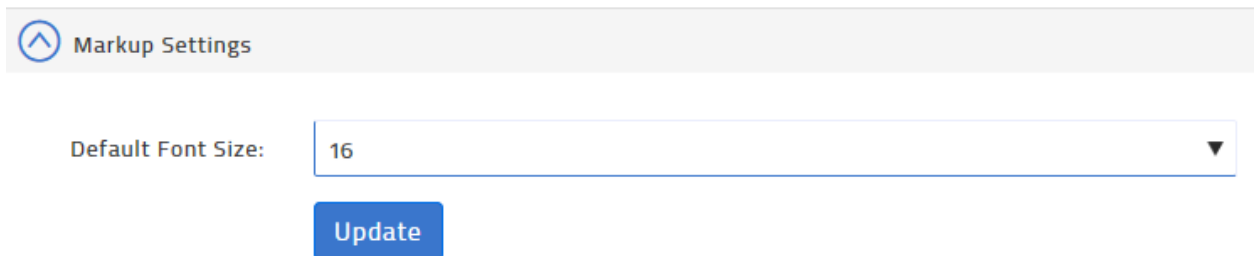


The screenshot shows a settings panel titled "Broker File Review" with a back arrow icon. It contains the following elements:

- Review Option:** A dropdown menu currently set to "Activate me as a broker reviewer".
- Send document review notifications:** A checked checkbox.
- Default Status:** A link labeled "Select Status".
- Update:** A blue button at the bottom.

See "[Broker File Review Settings](#)" below for detailed information about the broker file review settings fields. When you have finished making changes to the broker file review settings, click **Update**.

13. To configure the default markup settings, such as the default font size, click **Markup Settings**.








The screenshot shows a settings panel titled "Markup Settings" with a back arrow icon. It contains the following elements:

- Default Font Size:** A dropdown menu currently set to "16".
- Update:** A blue button at the bottom.

See "[Markup Settings](#)" below for detailed information about the markup settings fields. When you have finished making changes to the markup settings, click **Update**.

TRANSACTION SETTINGS

<u>Field</u>	<u>Description</u>
Default View	<p>Specifies the default view to use when displaying the list of transactions.</p> <p>All: Displays transactions owned by the user, and transactions shared by the user.</p> <p>Mine: Displays only transactions owned by the user.</p> <p>Shared: Displays only transactions shared with the user.</p>
Default Sort	<p>Specifies the default field to sort the list of transactions by, and the default sort order, ascending or descending.</p>
Default Status	<p>Specifies the status of transactions to display by default in the list of transactions.</p>
Default Display	<p>Specifies the default format of the transaction list display.</p> <p>List: Displays a list of transactions. Each item in the list includes the image, transaction name, type of listing, and the last modified date.</p> <div data-bbox="462 1186 1385 1774" style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: center;">Transactions</p> <div style="text-align: right; margin-bottom: 10px;"> <input type="text" value="Search"/> </div> <div style="display: flex; justify-content: space-between; margin-bottom: 10px;"> Dates ¹ ▾ Types ▾ Statuses ▾ Owners ▾ Sort ▾ Clear Apply </div> <p style="text-align: center; margin-bottom: 10px;">10 Results</p> <div style="border-bottom: 1px solid #ccc; padding-bottom: 10px;"> <div style="display: flex; align-items: flex-start;">  <div> <p>1177 Shearson Cres</p> <p>Residential Listing Open</p> <p>Modified: 5/10/18 9:12 AM</p> </div> <div style="margin-left: auto; text-align: right;"> <p>Comple</p> <div style="width: 20px; height: 15px; background-color: #ccc; border: 1px solid #ccc;"></div> </div> </div> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 10px;"> <div style="display: flex; align-items: flex-start;">  <div> <p>111 Wellington St</p> <p>Residential Sale Open</p> <p>Modified: 5/10/18 9:11 AM</p> </div> <div style="margin-left: auto; text-align: right;"> <p>Comple</p> <div style="width: 20px; height: 15px; background-color: #4caf50; border: 1px solid #ccc;"></div> </div> </div> </div> <div style="padding-bottom: 10px;"> <div style="display: flex; align-items: flex-start;">  <div> <p>1199 Sunnyside St</p> <p>Residential Listing Open</p> <p>Modified: 5/10/18 9:07 AM</p> </div> </div> </div> </div>

	<p>Grid: Displays a thumbnail view of the list of transactions in a grid. Each item in the list includes the image and the transaction name.</p> <p style="text-align: center;">Transactions</p> <hr/> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;">  <p>1199 Sunnyside St</p> </div> <div style="text-align: center;">  <p>166 Sunnyside St Waterloo</p> </div> </div>
<p>Create Cover Sheet</p>	<p>When checked, it automatically creates a fax cover sheet for the transaction.</p> <p>When unchecked, no fax cover sheet is created.</p>
<p>Use Wizard</p>	<p>When checked, when a user creates a new transaction, the option to use the wizard is selected. Users can still choose not to use the wizard.</p> <p>When unchecked, when a user creates a new transaction, the option to use the wizard is not selected. Users can still choose to use the wizard.</p>

DOCUMENT SETTINGS

<u>Field</u>	<u>Description</u>
<p>Transaction Documents Default View</p>	<p>Specifies how to order documents in the list of documents in a transaction.</p> <p>Sort: Sort the documents in the list alphabetically.</p> <p>Drag and drop: Allow the user to drag and drop the documents into the order they prefer.</p>
<p>Default Sort</p>	<p>Specifies the default field to sort the list of documents by.</p>

CHECKLIST SETTINGS

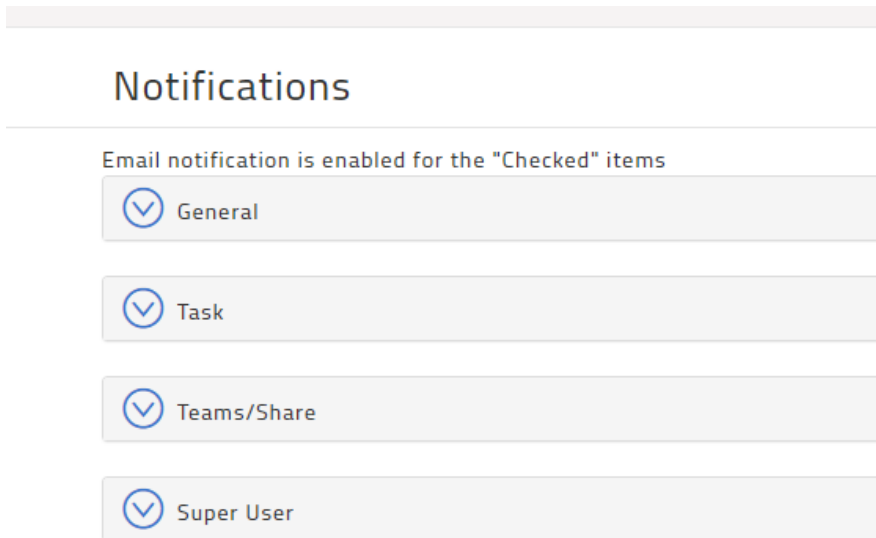
<u>Field</u>	<u>Description</u>
Transaction Checklist Default View	<p>Specifies how to order checklist items in the checklist in a transaction.</p> <p>Sort: Sort the items in the checklist alphabetically.</p> <p>Drag and drop: Allow the user to drag and drop the checklist items into the order they prefer.</p>

FORM SETTINGS

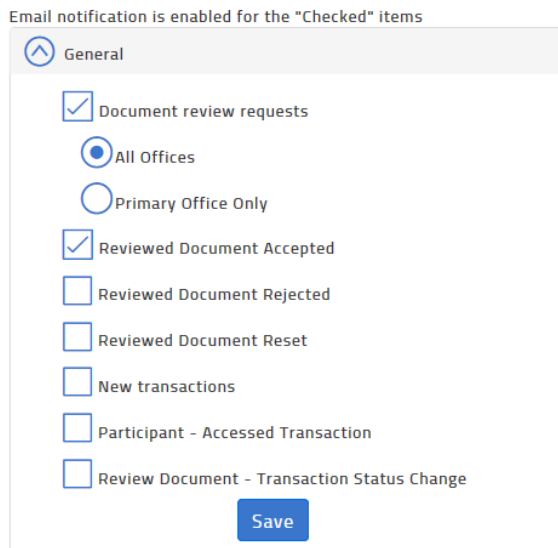
<u>Field</u>	<u>Description</u>
Default Sort	Specifies the default field to sort the list of forms by, and the default sort order, ascending or descending.
Default Font	Specifies the default font to use for text in forms.
Default Color	Specifies the default color to use for text in forms.
Default Size	Specifies the default font size, in points, to use for text in forms. Typical font sizes for documents range from 10 to 12 points.
Auto-save	When checked, it automatically saves a copy of the form periodically. Also automatically saves a copy of the form if you close the editor without saving.
Create copy when emailing	When checked, automatically saves a copy of the form when you email it to anyone, which creates an extra copy of the form. This is a useful feature when sending a completed form as an editable link: if the participant makes a mistake, you have an extra copy.

SETTING UP NOTIFICATIONS

1. Navigate to **Settings**.
2. Click **Notifications**. The Notifications page opens.

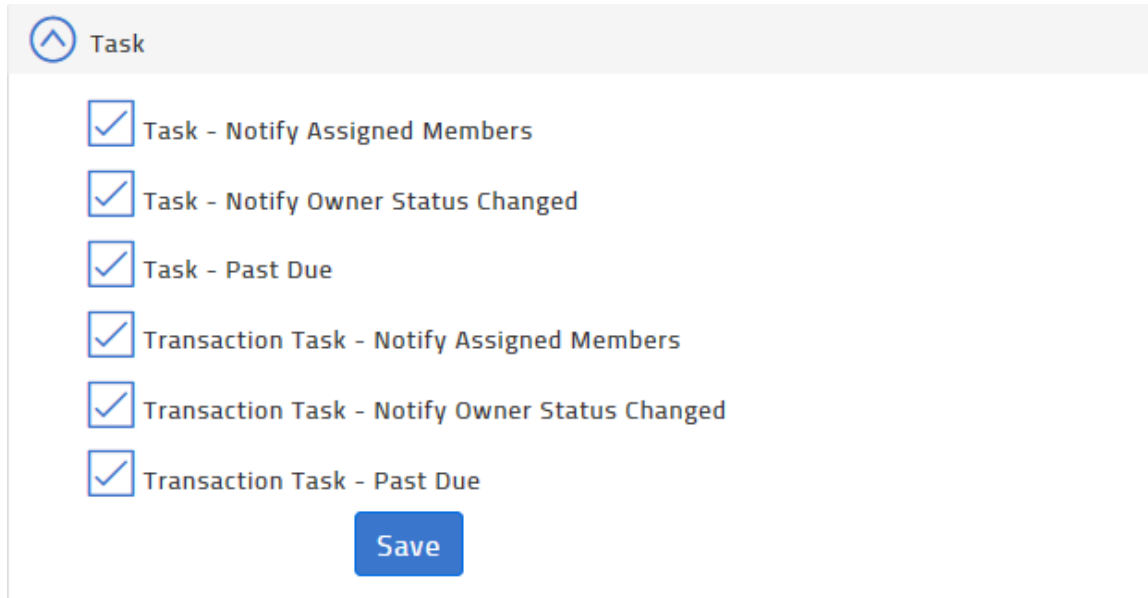


3. To receive notifications for document review requests, or when a new transaction is created, or to notify you when a participant accesses a transaction in the system, click **General**.



See "[General Settings](#)" below for detailed information about the email notification settings fields. When you have finished making changes to the email notification settings, click **Save**.

4. To receive notifications for tasks or transaction tasks, click **Task**.



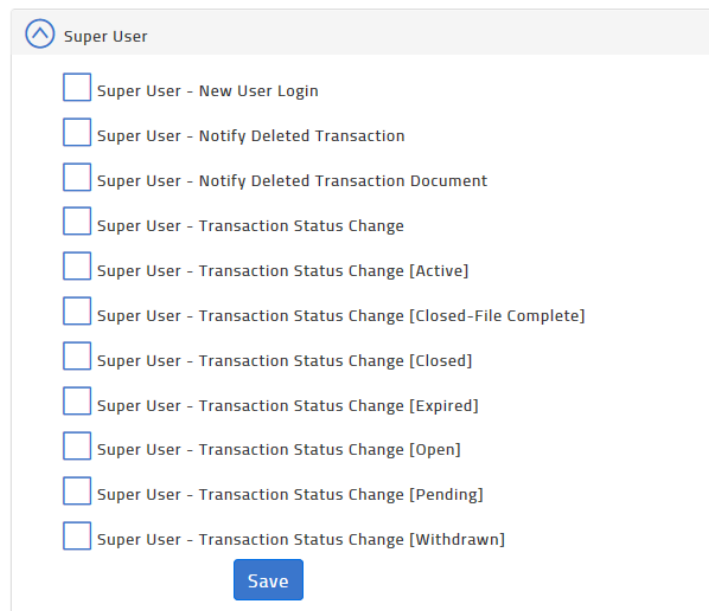
Task

- Task - Notify Assigned Members
- Task - Notify Owner Status Changed
- Task - Past Due
- Transaction Task - Notify Assigned Members
- Transaction Task - Notify Owner Status Changed
- Transaction Task - Past Due

Save

See "[Task Settings](#)" below for detailed information about the task notification settings fields. When you have finished making changes to the task notification settings, click **Save**.

5. **PRINCIPAL/MANAGING BROKERS:** For super users to receive notifications for various events in the system, click **Super User**.



Super User

- Super User - New User Login
- Super User - Notify Deleted Transaction
- Super User - Notify Deleted Transaction Document
- Super User - Transaction Status Change
- Super User - Transaction Status Change [Active]
- Super User - Transaction Status Change [Closed-File Complete]
- Super User - Transaction Status Change [Closed]
- Super User - Transaction Status Change [Expired]
- Super User - Transaction Status Change [Open]
- Super User - Transaction Status Change [Pending]
- Super User - Transaction Status Change [Withdrawn]

Save

See "[Super User Settings](#)" below for detailed information about the Super User settings fields. When you have finished making changes to the Super User settings, click **Save**.

GENERAL SETTINGS

<u>Field</u>	<u>Description</u>
Document review requests	<p>When checked, specifies to email a notification when a document review is requested.</p> <p>All Offices: Sends a notification for document review requests for all offices.</p> <p>Primary Office Only: Sends a notification for document review requests for only the primary office.</p>
Reviewed Document Accepted	When checked, specifies to email a notification when a document review is accepted.
Reviewed Document Rejected	When checked, specifies to email a notification when a document review is rejected.
Reviewed Document Reset	When checked, specifies to email a notification when a document review is reset.
New transactions	When checked, specifies to email a notification when a new transaction is created.
Participant - Accessed Transaction	When checked, specifies to email a notification when a participant accesses a transaction.
Transaction Status Change from Broker Review	When checked, specifies to email a notification if the reviewer changes the transaction status during a document review.

TASK SETTINGS

<u>Field</u>	<u>Description</u>
Task - Notify Assigned Members	When checked, specifies to notify the person or persons the task is assigned to.
Task - Notify Owner Status Changed	When checked, specifies to notify the owner of the task that the status changed.
Task -Past Due	When checked, specifies to notify the owner that the task is overdue.
Transaction Task - Notify Assigned Members	When checked, specifies to notify the person or persons the task is assigned to.
Transaction Task - Notify Owner Status Changed	When checked, specifies to notify the owner of the task that the status changed.
Transaction Task -Past Due	When checked, specifies to notify the owner that the task is overdue.

SUPER USER SETTINGS

<u>Field</u>	<u>Description</u>
Super User - New Note Added to a Document	When checked, emails a notification to all super users when a new note is added to a document.
Super User - New User Login	When checked, emails a notification to all super users when a new user logs in to the system.
Super User - Notify Deleted Transaction	When checked, emails a notification to all super users when a transaction is deleted.

Super User - Notify Deleted Transaction Document	When checked, emails a notification to all super users when a transaction document is deleted.
Super User -Transaction Status Change	When checked, emails a notification to all super users when a transaction changes status.
Super User -Transaction Status Change (Active)	When checked, emails a notification to all super users when a transaction status changes to Active.
Super User -Transaction Status Change (Closed - File Complete)	When checked, emails a notification to all super users when a transaction status changes to Closed - File Complete.
Super User -Transaction Status Change (Closed)	When checked, emails a notification to all super users when a transaction status changes to Closed.
Super User -Transaction Status Change (Expired)	When checked, emails a notification to all super users when a transaction status changes to Expired.
Super User -Transaction Status Change (Open)	When checked, emails a notification to all super users when a transaction status changes to Open.
Super User -Transaction Status Change (Pending)	When checked, emails a notification to all super users when a transaction status changes to Pending.
Super User -Transaction Status Change (Withdrawn)	When checked, emails a notification to all super users when a transaction status changes to Withdrawn.

Transaction Desk Basic #2

TRANSACTION NAVIGATION BAR

From the dashboard, click on the **Transactions**  icon from the Navigation Bar.




ACTIVITY

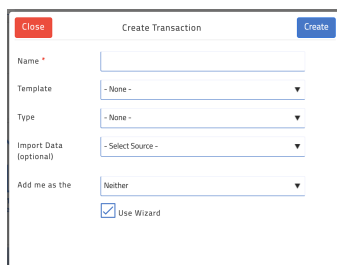
- Change the view from **Grid** to **List**
- Click through the filter toolbar, change the settings, and click **Apply Filter**
- In the top right corner, click **+Add** and create a “Training” Transaction

CREATE A TRANSACTION

You can use a transaction to represent any interaction with a client, from a new listing to the time of an offer. You can add a transaction manually, where you manually provide all of the transaction information. You can also use an **MLS listing** or the tax data record to automatically populate many of the fields in the transaction, decreasing the time it takes to add a transaction in TransactionDesk Edition.

STEPS

- Navigate to **Transactions**. Found in the navigation bar . 
- Click **+Add**. Found in the upper right corner.


A screenshot of the 'Create Transaction' form. The form has a 'Close' button in the top left and a 'Create' button in the top right. The fields include: 'Name *' (text input), 'Template' (dropdown menu with '- None -'), 'Type' (dropdown menu with '- None -'), 'Import Data (optional)' (dropdown menu with '- Select Source -'), and 'Add me as the' (dropdown menu with 'Neither'). There is a checked checkbox for 'Use Wizard'.

- In the **Name** field, enter a name for the transaction.
 - Typically, this is the street address of the property or the consumer's name.
- Use the **Template** dropdown to select the appropriate template to automatically add a checklist, forms, and documents.
- Use the **Import Data** dropdown if you need to select an MLS listing as a source of information for the transaction. Depending on your board/association, you can import seller, agent, brokerage, and/or property information. Additional fields appear.
 - Many in Tennessee are: **RealTracs (Web API)**

Import Data (optional) RealTracs (Web API) ▼

MLS Number

- In the **MLS Number** field, specify the MLS number of the listing.
- Use the **Add me as the** dropdown to select your role in the transaction.
 - Choose from: *Listing Agent, Selling Agent, Neither, or Both.*
- Check **Use Wizard** if you need to create the transaction using a guided walkthrough.
- Click **Create**. If you checked Use Wizard, then the Wizard appears.



Transaction Desk Basic: 123 Apple Street

[Start CMA](#)

Address: 123 Apple Street, Clarksville





Buyer:

Agent: Kayla Pierson

Open ▼

Listing #: 1234567

Seller:

Wizard

Prev

Details


Step 1 of 5

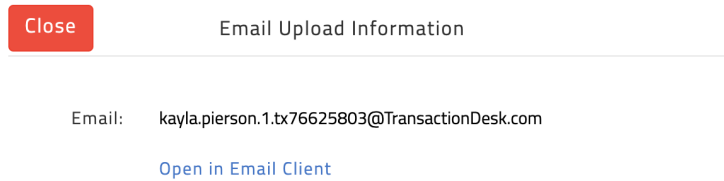
Next


<p>Transaction Type</p> <p>Residential Sale ▼</p> <p>Address Information</p> <p>Street Number: <input type="text" value="123"/></p> <p>Street Name: <input type="text" value="Apple Street"/></p> <p>Unit #: <input type="text"/></p> <p>City: <input type="text" value="Clarksville"/></p> <p>County: <input type="text" value="Montgomery"/></p> <p>State: <input type="text" value="TN"/></p>	<p>Transaction Status</p> <p>Open ▼</p> <p>Property Information</p> <p>Property Type: Residential ▼</p> <p>MLS Number: <input type="text" value="1234567"/></p> <p>Year Built: <input type="text" value="1987"/></p> <p>School District: <input type="text"/></p> <p>Instrument No: <input type="text"/></p> <p>Tax Number: <input type="text"/></p>
--	--

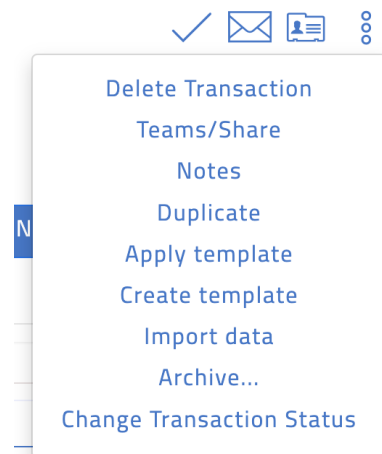
If you imported information from MLS, then much of the listing information is populated automatically from the MLS listing into the fields on Step 1 of the wizard.

- At the top of the page, you can do any of the following:
 - Update the listing address
 - Use the status dropdown to set the transaction status

- Click email  to view the specific email address for the transaction that you can use to email documents directly to the transaction.



- Use the more options menu  to do any of the following:
 - Delete the transaction.
 - Share the transaction with other agents within your office.
 - Add a note to the transaction.
 - Duplicate the transaction.
 - Create or apply a template to the transaction.
 - Import information from an MLS listing.
 - Archive the transaction.
 - Update the transaction status.



- **Note:** From this point on, the steps follow as if you are using the wizard to create the transaction, but you can complete them in any order. In the Details tab of the transaction, in the **Property Information** area, enter as much information as you can.

The Back Office number applies to integrations with the Back Office accounting system, and is not available until after the transaction is sent to Back Office.

- Scroll down to the **Listing Information** area, and enter any additional information.

Listing Information	
List Price	299900
Bal. Of 1st Mortgage	
Bal. Of 2nd Mortgage	
Other Liens	
Other Liens Desc.	
Total Encumbrances	
Property Includes	GE Side By Side Stainless Steel Refrigerator and Shed
Property Excludes	Curtains in Bedrooms
Leased Items	Propane Tank & ABC Security System

- If this transaction includes sale information, in the **Purchase Information** area, enter as much information as you can.

Purchase Information	
Purchase Price	299900
Deposit	2000
Additional Deposit	
Total Financing	

- In the **Transaction Dates** area, enter as much information as you can.
- If applicable, in the **Mortgage Dates** area, enter as much information as you can.

Transaction Dates	
List Date	02/22/2023
Expiration Date	mm/dd/yyyy
Offer Date	03/01/2023
Offer Expiration Date	03/02/2023 6 PM :00
Binding Agreement Date	mm/dd/yyyy
Additional Deposit Date	mm/dd/yyyy
Closing Date	04/03/2023
Funding Date	mm/dd/yyyy
Possession Date	04/03/2023 12 AM :00

- Click **Next** to continue and add contacts, forms, and documents, to the transaction.
(*Note: At any time, you can scroll down and click **Save and exit.***)
- If you navigate away from the wizard, click the **Contacts** tab on the right toolbar in the transaction. The Contacts page appears. This page lists all of the contacts associated with the transaction.

Note: If you added yourself to the transaction, your name appears.
Other contacts are populated from the MLS listing.

Wizard

Prev

Contacts
Step 3 of 5

Next

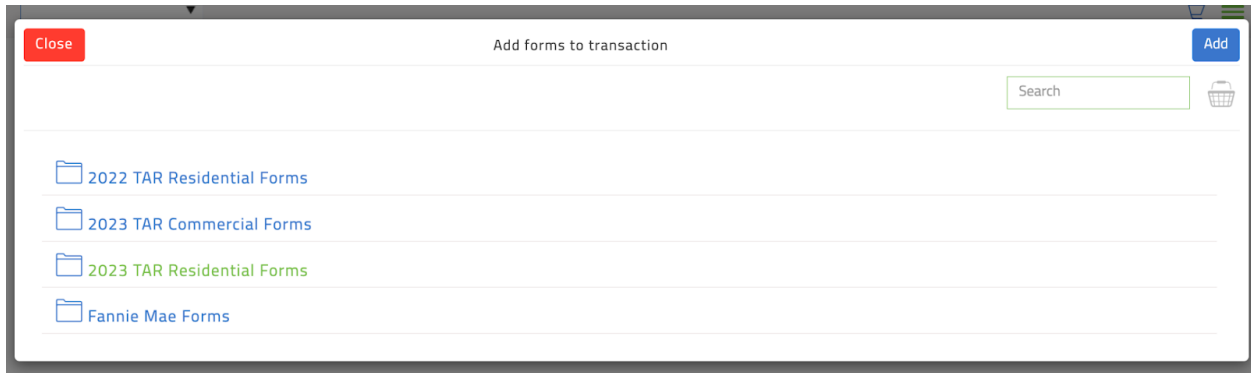
+
Add

<p>Kayla Pierson Selling Agent</p>	⋮
<p>Bedrock Realty Selling Broker</p>	⋮
<p>Cosmo Spacely Listing Agent</p>	⋮
<p>Spacely Space Realty Listing Broker</p>	⋮

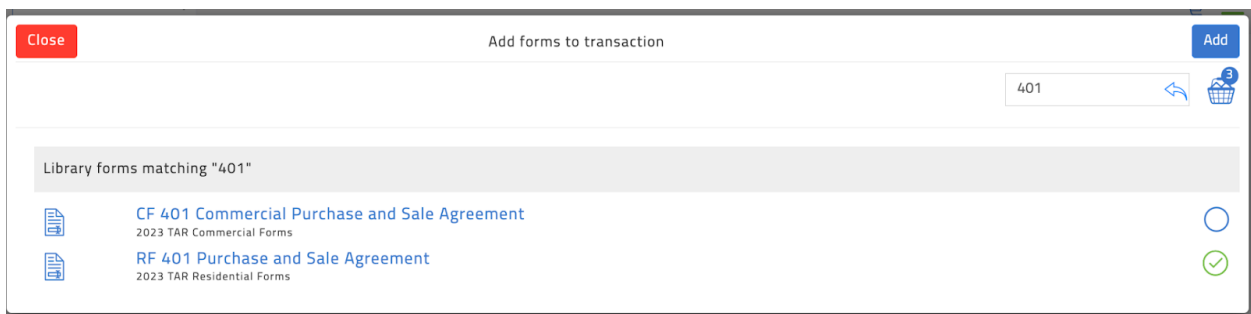
Save and exit

- To add a contact to the transaction, click **+Add**, and do one of the following:
 - Select **Create new transaction contact** to create a new contact in the transaction. Add the contact information, ensuring you provide the required information. To add the contact to your list of contacts, ensure **Add to address book** is checked. Click **Save**.
 - Select **Add existing contact** to add a contact to the transaction from your existing list of contacts. Check one or more contacts from the list that appears, and click **Add**. Add any additional information required, and click **Save**.
 - If you are not already listed, Select **Add yourself** to add yourself to the transaction. Add any additional information required, and click **Save**.
 - Select **Add contact from Google** to add one or more contacts from your Gmail list of contacts to the transaction and to the existing list of contacts in TransactionDesk. Check the contact to add, and click **Select**. Add any additional information required, and click **Save**.

- Click **Next**, or click the **Forms** tab. The Forms page appears. Any forms associated with the transaction through the template are listed here.
- To add more forms to the transaction, click **+Add**.
- The **Add forms to transaction** page appears.

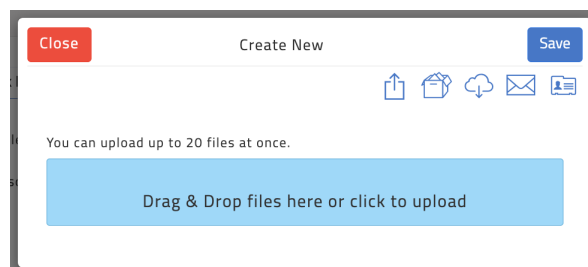


- Navigate through the folder structure and locate the form you want to add, or search for the form by name in the Search box.
- When you locate a form you want to include, use the selection box to the right of the form name to select the form for inclusion in the transaction, and click **+Add**.







You can see how many forms are selected in the shopping basket in the top right corner of the page.

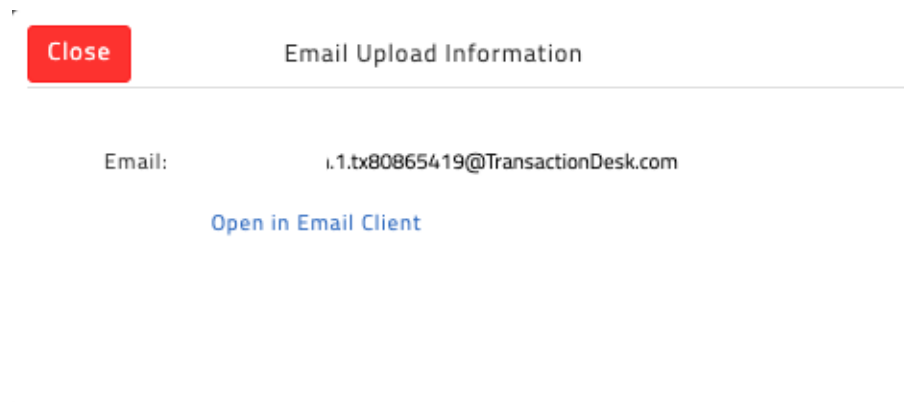
- Click **Next**, or click the **Documents** tab. The Documents page appears.
 - *This is the list of documents associated with the transaction. Any documents that you want to keep as part of the transaction file can be uploaded here, such as property disclosures, maps, or any other documents.*
- To attach a document to the transaction, click **Add**. The Create New page appears.




ACTIVITY

Try one or more of the following:

- To upload a document from your computer, click  (selected by default when you first see the page). Then drag and drop files from your computer to the **Drag & Drop files here** area, or click the blue bar to browse for the document(s) you want to upload.
- To copy documents from Documents, click . Navigate to and select the appropriate document, and click **Save**.
- To import a document from Dropbox, Google Drive, or another third-party document storage system, click . Select the appropriate third-party document storage system, locate the document, and click **Add**.
- To upload a document from your email account, click . The Email Upload Information page appears. Click **Open in Email Client**. Locate the document, and click **Add**.




- To download a contact card for the transaction, so that you can email documents directly to the transaction, click . *This adds an email contact to your email. You can email documents directly to this contact, and the documents are attached automatically to the transaction.*
- Click **Done**. The transaction is added to the list of transactions in the system.

Transaction Desk Basic #3

MANAGING CHECKLISTS & TASKS

If your brokerage requires it, you may need to attach documents directly to a checklist item in the applicable transaction. This is a simple exercise, requiring just a few steps on your part.

ATTACH A DOCUMENT TO TRANSACTION CHECKLIST

Note: A Super User, you can set a  **mandatory lock** or unlock the items in a checklist. When you add or remove the mandatory lock on a checklist this also adds or removes the mandatory lock from any attached documents in the checklist.

Similarly, the super user can add or remove the mandatory lock from the document itself which will also remove it from the associated checklist.

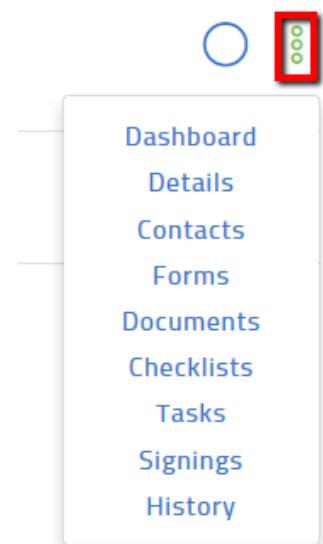
ACTIVITY

1. Navigate to the list of transactions by clicking the Transactions icon .

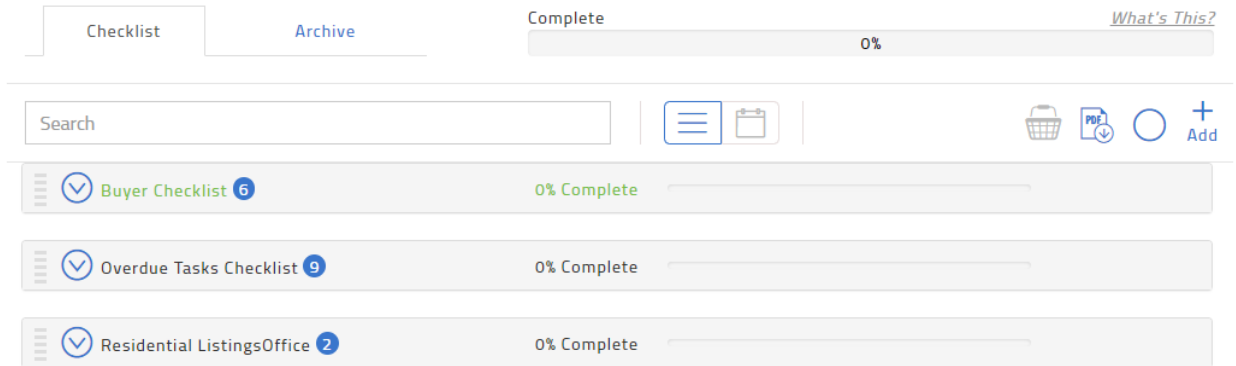


2. Change your view to **LIST** mode and click the **More Options Menu** to the right of the transaction you want, and select **Checklists**.

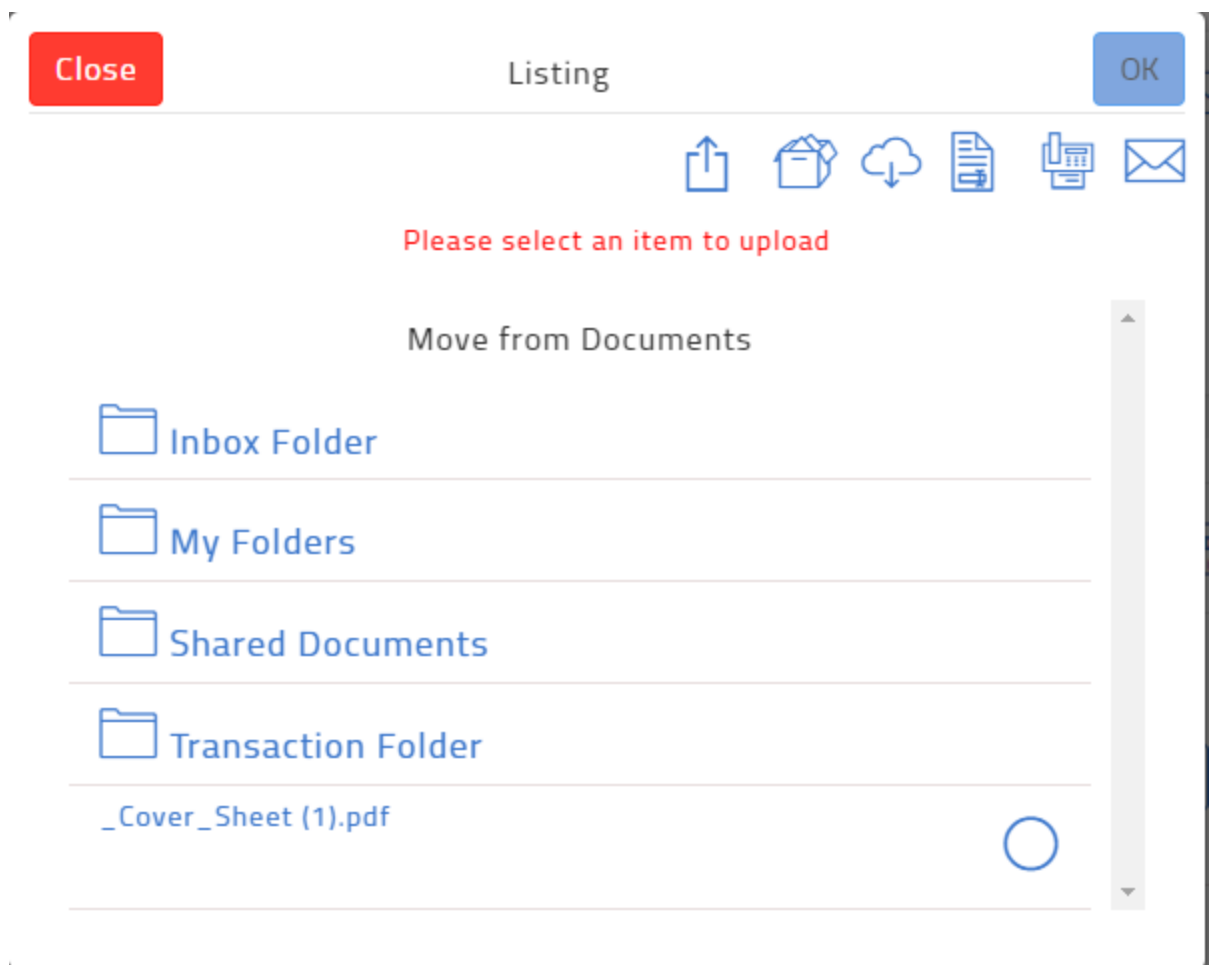
The list of checklist items for the transaction appears.




3. Locate the checklist item where you need to attach the document.







4. Click **Attach**.



5. Do one or more of the following:

- To upload a document from your computer, click  (selected by default when you first see the page). Then drag and drop files from your computer to the

Drag and Drop Files here area, or click the blue bar to browse for the document(s) you want to upload.

- To copy documents from Documents, click  . Navigate to and select the appropriate document, and click **Save**.
 - To import a document from DropBox, Google Drive, or another third-party document storage system, click  . Select the appropriate third-party document storage system, locate the document, and click **Add**.
 - To upload a document from your email account, click  . The Email Upload Information page appears. Click **Open in Email Client**. Locate the document, and click **Add**.
 - To download a contact card for the transaction, so that you can email documents directly to the transaction, click  . This adds an email contact to your email. In future, you can email documents directly to this contact, and the documents are attached automatically to the transaction.
6. Click **Save**. If the document is identified as mandatory in a checklist, it is automatically sent for broker review, and you see this symbol:



If you need to send the document for broker review, to the right of the document, select

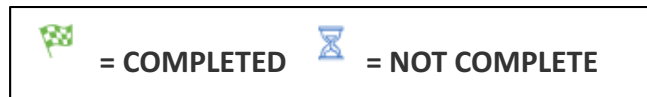


Next Steps

Be sure to use the Rejected Document Reviews widget in your dashboard so that you see any documents that were not approved during the review process. From there, you can quickly see any review notes on the document, and upload a revision.

COMPLETE OR REOPEN A TASK

You use checklists and tasks to manage the work associated with a transaction from consultation to closing. When you have finished doing the work outlined in a TransactionDesk task, you want to mark the task complete. If you mark a task as complete in error, you can reopen the task until it is actually complete. The checkered flag will revert back to the hourglass.



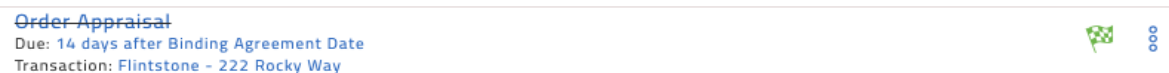
ACTIVITY

#1. Mark a task in a transaction complete from the Transaction Dashboard

1. Navigate to the transaction the task is associated with.
2. In the right-hand menu, select **Tasks**. *The list of tasks for the transaction appears.*
3. Click on the hourglass to the right of the task name .



4. Once checked & completed, a checkered flag appears in place of the hourglass.



#2. Mark a standalone task complete from the Tasks Dashboard

1. From the Agent Dashboard, open the left-hand menu. Navigate to **Tasks** . The list of standalone and transaction tasks is displayed.



2. Click on the hourglass to the right of the task name .
3. The task is completed, and a checkered flag appears in place of the hourglass.


#3. Reopen a completed task

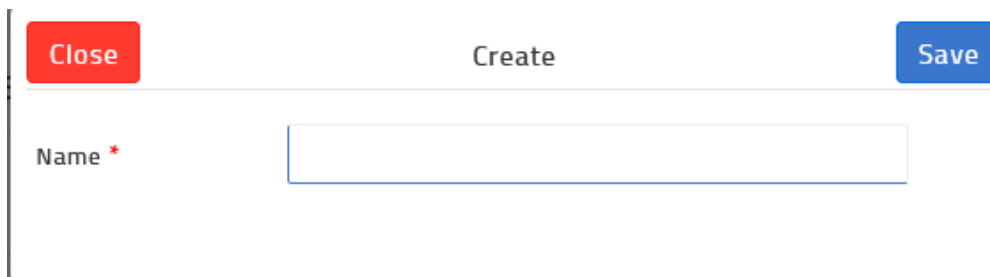
1. Locate the completed task you need to reopen.
2. Click the flag to the right of the task name .
3. The task is reopened, and an hourglass appears in place of the flag.

Transaction Desk Advanced #4

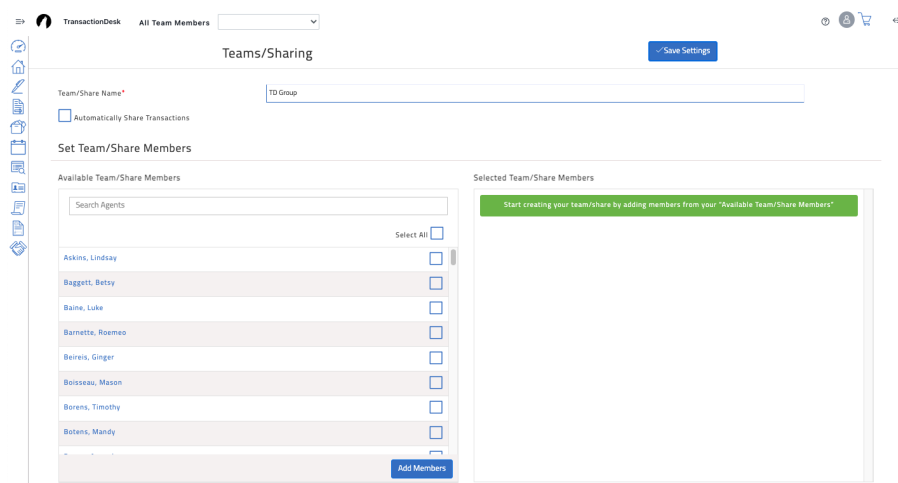
TEAMS AND SHARING

Many brokerages have teams of agents that work together on some or all transactions. Before agents can share transactions, the agents must be added to the same “*Team*”. You can create a sharing group or team, and add or remove agents as needed. You can also add an administrator to the team, and allow them to impersonate agents on the team, so they can assist with updating transactions, documents, and so on.

1. In the global header bar, click your profile  , and then click **Settings**.
2. Click **Teams/Sharing**.
3. Click **+Add**. The Create popup opens.



4. In the **Name** field, enter a name for the team/group.
5. Click **Save**.



- From the list of Available team/Share Members (*Users from the Same Firm*), check one or more agents to include in the team, and click **Add Members**. The selected team members appear on the right side of the page.

Selected Team/Share Members

Save Settings

Select All

Cook, Jen Remove Member

Transaction Permissions

Full

Allow Impersonation

Horner, Brenda Remove Member

Transaction Permissions

Full

Allow Impersonation

- For each selected member, specify the transaction permissions. Do one of the following:
 - To give a member read-only access to your transactions, use the **Transactions Permissions** dropdown to select **Read**. Users with this permission can view transactions but cannot change them.
 - To give a member write access to your transactions, so they can update them, but not allow them to delete transactions, use the **Transaction Permissions** dropdown to select **Write**.
 - To give a member full read/write/delete access to your transactions, use the **Transactions Permissions** dropdown to select **Full**.
- For any members of the team that you want to allow to impersonate you so they can update transactions as applicable, check **Allow Impersonation**. (*See Your Broker*)
- If this team will potentially share all transactions, check **Automatically Share Transactions**. In the future, when you create a transaction, it is automatically shared with your teammates.
- When you have finished adding members with the appropriate privileges, click **Save Settings**.

Next Steps

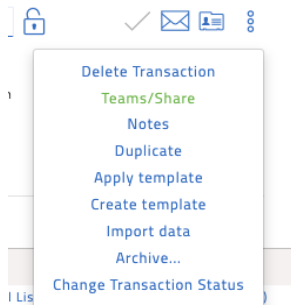
If you did not specify to automatically share all transactions, when you create a transaction that should be shared, remember to share the transaction with your team.


Also, consider creating a transaction template that shares any transactions created using that template.

When you share a transaction, the person you share it with sees an **orange "Shared" indicator** by the transaction in their account.


If you want to stop sharing a specific transaction, you can edit the transaction and change **Teams/Sharing** for the individual transaction.

ACTIVITY



From the dashboard, click on the **Transactions**  icon from the Navigation Bar.

Open a Transaction.

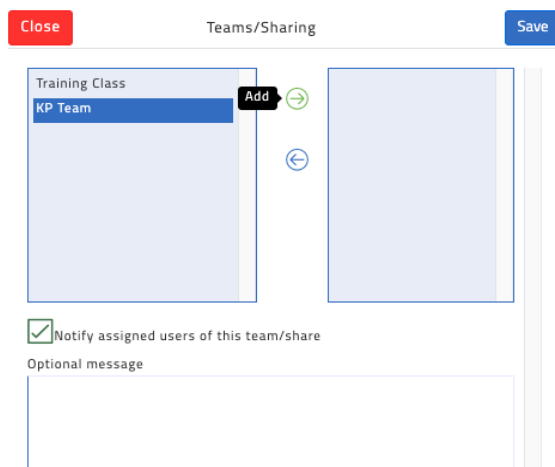
In the upper toolbar, click the  Menu button.

Click **Teams/Share**

Select the Team you would like to share with → Click the 

Check the box for **Notify assigned users of this team/share**

Click **Save**.



Transaction Desk Basic #5

TRANSACTION DESK MOBILE APP

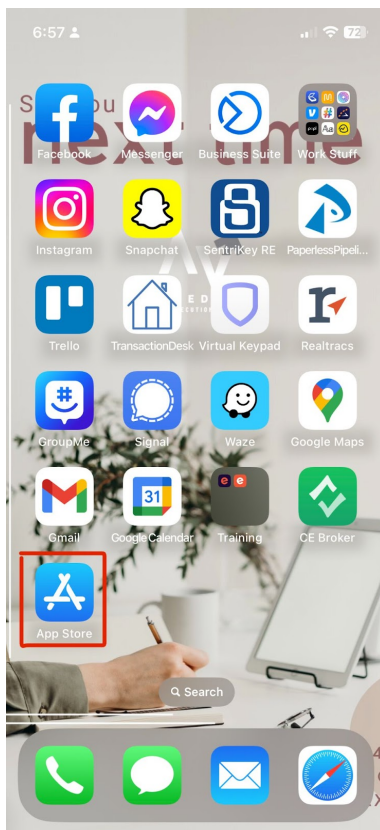
You can access TransactionDesk from a mobile device using the TransactionDesk app.

Before you begin

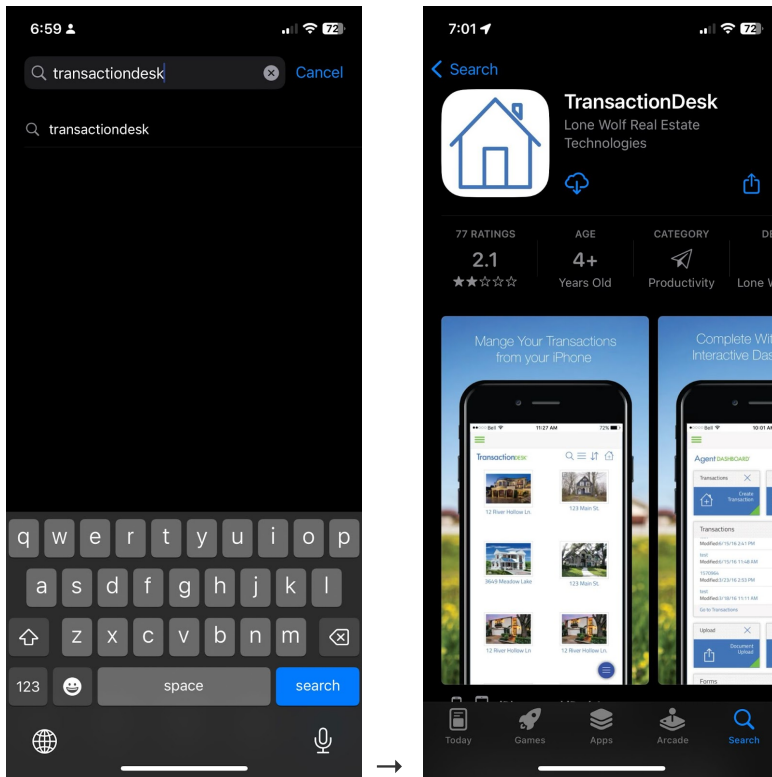
The app requires an **Apple mobile device** (*iPhone/iPad*) with wi-fi connection.

INSTALL THE APP

1. Navigate to the Apple **App Store** on your device.



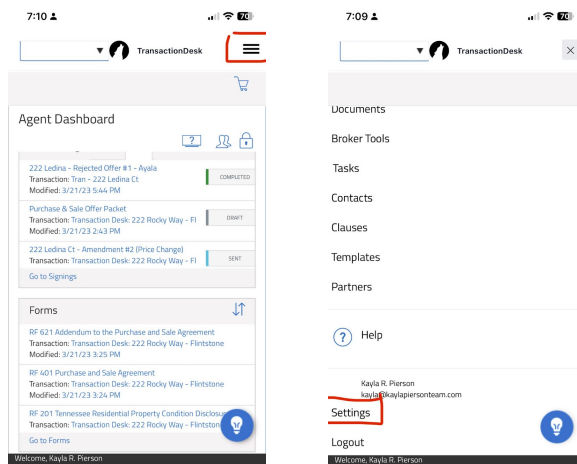
- Use the search field to type TransactionDesk, and then tap search. The list of apps is updated to include the TransactionDesk app.



- Tap download. The app is downloaded to your mobile device, installed, and added to the list of apps on your mobile device.

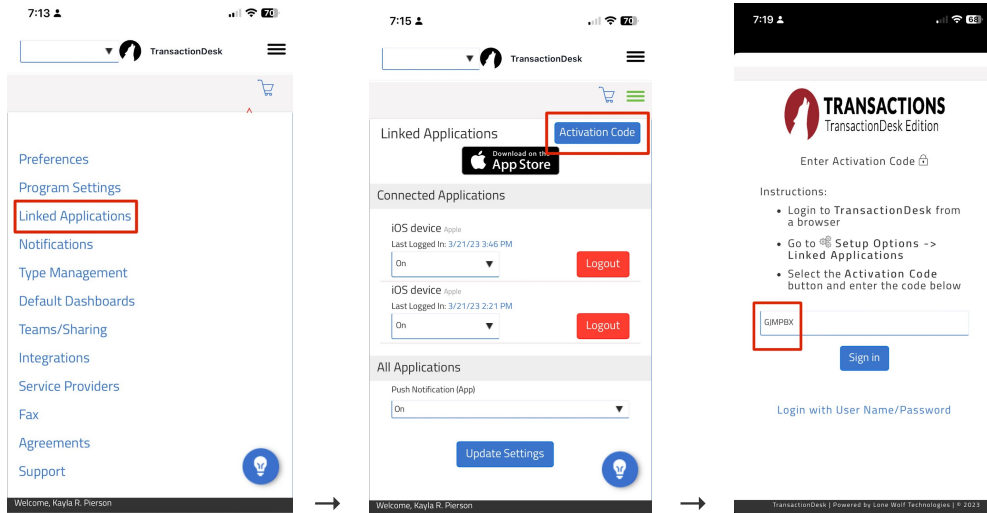
ACTIVATE THE APP

- Log in to TransactionDesk via your desktop computer or mobile device's mobile browser.
- Mobile Device:** On the dashboard, tap the hamburger menu in the top right corner. The TransactionDesk navigation menu expands. Scroll to the bottom and click **Settings**.



3. Click **Linked Applications** → **Activation Code**

The Activation Code is only valid for 15 minutes. If you are unable to complete the next steps within 15 minutes you need to repeat this step.



4. On your mobile device, open the TransactionDesk app.
5. On the login page, type the alphanumeric code in the **ACTIVATION CODE** field.
6. Click **Sign in**.
7. Allow or Don't Allow Push Notifications.
8. The TransactionDesk App is now activated.
9. Repeat for all Apple mobile devices.

To organize your dashboard, click the **padlock** like you do on the desktop version. This will allow you to **add or remove** blue or green **widgets**. This layout adjustment will not change your desktop version, so you can place the widgets in a way that makes the most sense for you while you are on the go.

To access the Navigation Bar, click on the hamburger menu on the top right corner.

