

Getting Started with TransactionDesk for Brokers and Admins



This Getting Started guide is designed to provide self-paced resources to help you understand the role of a broker or administrator with Transactions (TransactionDesk Edition) and highlight the numerous benefits of using this platform. These resources, including videos, articles, and webinars, will equip you with the necessary knowledge to effectively use TransactionDesk Edition. At the end of this guide, you'll find additional resources to continue your learning journey and expand your knowledge further.

Account Setup

Setup the Broker Dashboard – [Watch the Video](#)

Broker Dashboard Widgets

Create Transaction		A shortcut to create a transaction.
Open Reports		A shortcut to select a report to view.
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.
Fax Documents		A shortcut to fax documents or forms.

Impersonate Agent		Provides a summary list of agents you can select to quickly impersonate. Click on an agent name to impersonate that agent. The widget also provides a shortcut to the list of agents.
Transactions Last 7 Days		Provides a summary list of transactions created in the last seven days. Click on a transaction name to go to the transaction dashboard. The widget also provides a shortcut to the list of all transactions.
Transactions Last 30 Days		Provides a summary list of transactions created in the last 30 days. Click on a transaction name to go to the transaction dashboard. The widget also provides a shortcut to the list of all transactions.
Transactions Past Closing Date		Provides a summary list of transactions that are past their closing dates. Click on a transaction name to go to the transaction dashboard. The widget also provides a shortcut to the list of all transactions.
Transactions Past Expiration Date		Provides a summary list of transactions that are past their expiration dates. Click on a transaction name to go to the transaction dashboard. The widget also provides a shortcut to the list of all transactions.
Transactions By Office		Provides a summary list of transactions for the office. Click on a transaction name to go to the transaction dashboard. The widget also provides a shortcut to the list of all transactions.
Transactions Closing Next 7 Days		Provides a summary list of transactions that are closing in the next seven days. Click on a transaction name to go to the transaction dashboard. The widget also provides a shortcut to the list of all transactions.
Transaction Templates		Provides a summary list of transaction templates. Click on a template name to view the template. The widget also provides a shortcut to the list of all templates.
Documents Waiting for Review		Provides a summary list of documents awaiting review. Click on a document name to view the document. You can review a document, and accept or reject it directly from the widget. The widget also provides a shortcut to Document Review to see the full broker review list.
Incomplete Checklist Items		Provides a summary list of checklist items that are not yet completed. The transaction each item is associated with, the name of the user, and the items that are incomplete are displayed. Click on a transaction name to go to the transaction dashboard. By default, checklist items are listed by last modified date, with the most recently modified items at the top of the list.
Overdue Tasks		Provides a summary list of tasks that are overdue. The due date for each task is listed. Click on a task name to view the task. Click on the hourglass to mark the task complete. You can also delete the task directly from the widget. The widget also provides a shortcut to the list of all tasks.
Office Tasks		Provides a summary list of incomplete tasks for the entire office. The due date for each task is listed. Click on a task name to view the task. Click on the hourglass to mark the task complete. You can also delete the task directly from the widget. The widget also provides a shortcut to the list of all tasks.
System Messages		Provides a summary list of system messages. These messages include updates about TransactionDesk including new features and any announcements about the application. Messages remain in this list until you open them and mark them to not show again.
Notes		Provides a summary list of notes added to all documents by all users. 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.

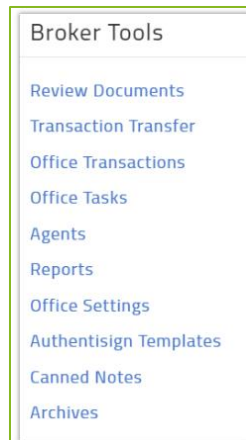
Transaction Tools

- View all transactions and their statuses

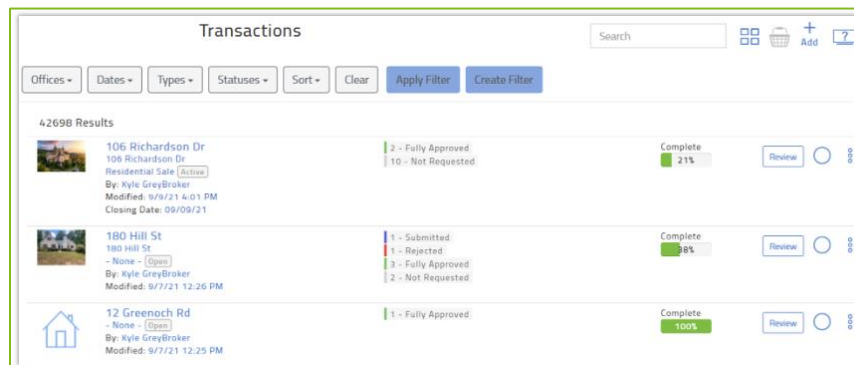
As a broker, it's crucial to have a comprehensive view of all the transactions in progress in your brokerage and to be able to monitor their status.

Steps

1. Navigate to Broker Tools.



2. Select Office Transactions. The list of all office transactions is displayed.



For each transaction, the number of checklist items in each status is listed, and a progress bar shows the checklist completion percentage.

If you are set up as a document reviewer, you can click **Review** to launch a quick review of a transaction.

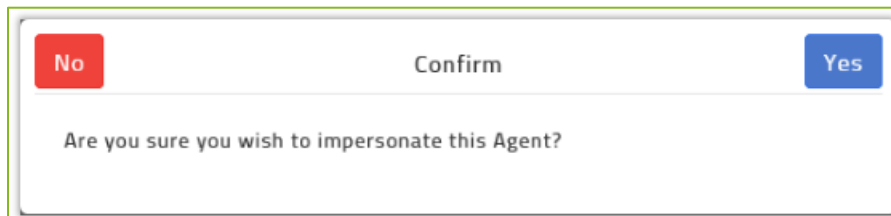
You can click on the transaction name to open the transaction dashboard for a transaction. You can also click More Options green more options menu ellipsis icon to select any aspect of the transaction to view or edit, including the details, contacts, forms, documents, checklists, tasks, or signings, or to view the history of the transaction.

Impersonate an Agent

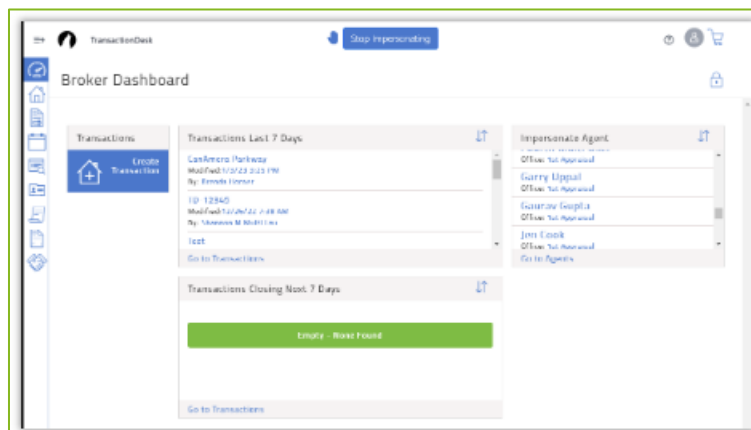
As a broker or staff member, you can create or modify transactions on behalf of an agent by impersonating the agent. You must have super-user privileges to impersonate an agent.

Steps

1. Navigate to **Broker Tools** broker tools  and select **Agents**.
2. In the list, locate the agent you want to impersonate.
3. To the right of the agent names, click more options and select **Impersonate**.



4. Click **Yes**. Your view in TransactionDesk changes to include a pink banner across the top whenever you are impersonating another user.



When impersonating another user, you are logged into the system as that user. Anything you do in the system appears to be done by the other user.

5. To stop impersonating the user, click the blue hand in the upper left corner.

Transfer a Transaction to Another Agent

When an agent leaves your office, and your brokerage has enabled the Transaction Transfer feature, all of the files created under that agent are transferred to the office they just left. You may want to transfer the transactions you received to another agent, yourself, or the previous agent in TransactionDesk Edition.

You must have Super-User access to transfer transactions.

In this article:

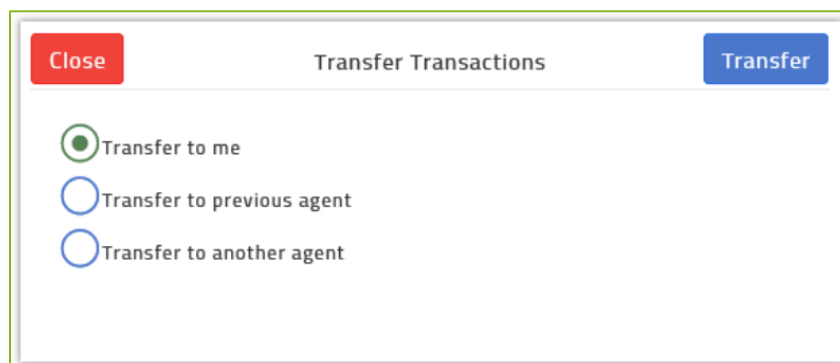
- Transfer a transaction that has defaulted to you
- Transfer a transaction from someone else
- Agents whose transactions have been transferred
- Transfer a transaction that has defaulted to you

Transfer a transaction that has defaulted to you.

1. Navigate to Broker Tools
2. Select Transaction Transfer—the list of transactions transferred to your displays. The name of the agent from which the transaction was transferred is displayed.
3. Select (check) the transaction and click the basket icon. You can select multiple transactions, provided they will be transferred to the same person.



4. Select who you want to transfer the transactions to.



If you select Transfer to the previous agent, the transaction is transferred to the last agent, regardless of their current brokerage.

If you select Transfer to another agent, additional fields are displayed. You choose the office first and then the agent.

Close

Transfer Transactions

Transfer

☐ Transfer to me

☐ Transfer to previous agent

☒ Transfer to another agent

Select office and agent to transfer the 1 selected transactions to

Office *

Agent *

5. Click Transfer. The transactions are transferred and no longer appear in your list of transactions.
6. Confirm the transfer by clicking Yes.

The agent receiving the transaction is sent an email confirming the transfer, and you should see a confirmation message at the top right of your page.

Transfer a transaction from someone else.

1. Navigate to Broker Tools.
2. Select Office Transactions
3. Select (check) the transactions you want to transfer and click the basket icon. You can select multiple transactions, provided they will be transferred to the same person.
4. Select the transfer icon.

Close

Transactions

Transfer Transactions

Buyer Side		
ertert		
Don Priest		

5. Select who you want to transfer the transactions to.

If you select **Transfer to me**, the transaction is transferred to you.

If you select **Transfer to another agent**, choose the office first and then the agent.

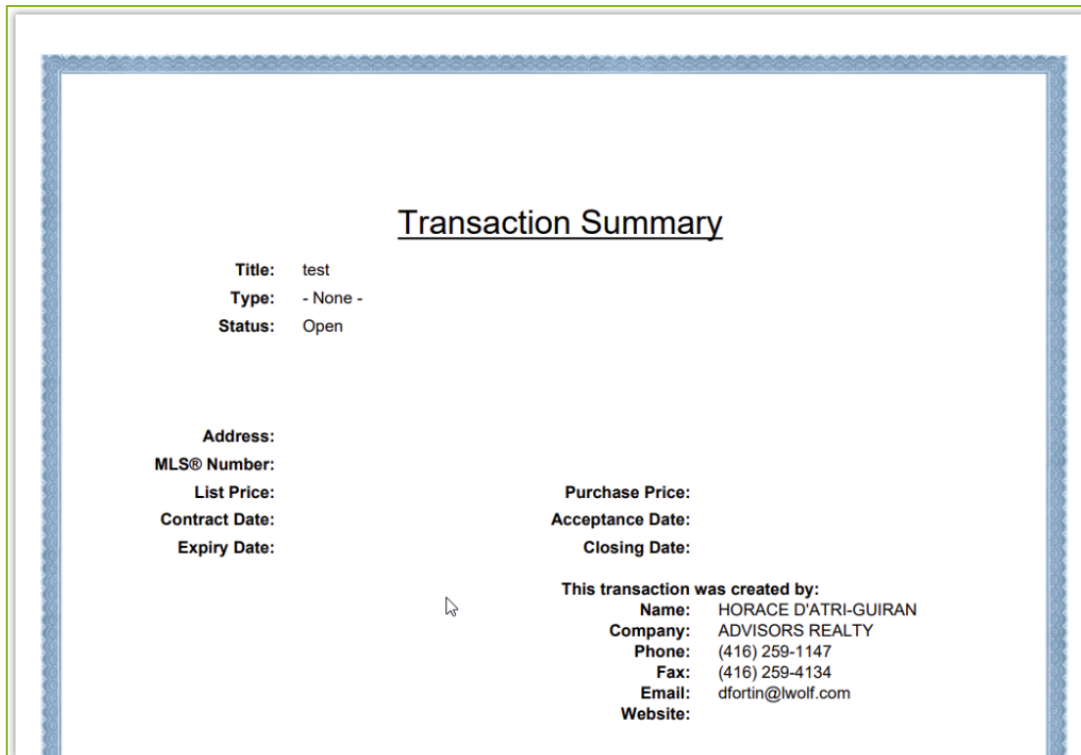
6. Click Transfer.

Agents whose transactions have been transferred

Agents whose transactions have been transferred to another office receive an email from TransactionDesk Edition with a link to their transactions. They can access the transactions and download the document from the transaction.

1. When your transaction is transferred to another office, you automatically receive an email from TransactionDesk Edition. The email includes a list of the transferred transactions and a link to each transaction.

2. To access the transaction, click the link in the email. The transaction name is tested in the above example.



The image shows a 'Transaction Summary' form with a blue decorative border. The form contains the following fields and values:

Title: test	
Type: - None -	
Status: Open	
Address:	
MLS® Number:	Purchase Price:
List Price:	Acceptance Date:
Contract Date:	Closing Date:
Expiry Date:	
This transaction was created by:	
Name:	HORACE D'ATRI-GUIRAN
Company:	ADVISORS REALTY
Phone:	(416) 259-1147
Fax:	(416) 259-4134
Email:	dfortin@lwolf.com
Website:	

3. The link downloads a PDF of the transaction. Any documents attached to the transaction are also connected to the PDF. Save the PDF and its attachments to a location you can access in the future. The PDF file name is the same as the transaction name in TransactionDesk Edition.
4. Repeat steps 2 and 3 for each transaction in the list.

Notes:

Suppose your office has the Enable Transaction Transfer setting set to Yes. In that case, when the agent leaves an office to go to another office, the transactions created at the current office are automatically transferred to the Super User for that office location.

Broker Tools – [Watch the Video](#)

Templates – [Watch the Video](#)

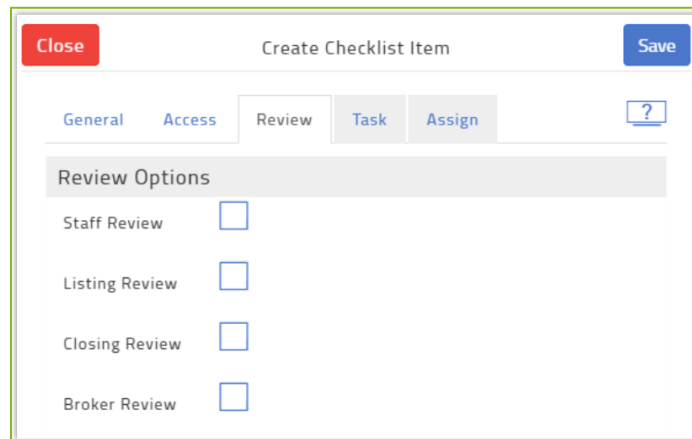
Checklists – [Watch the Video](#)

Broker File Review

The Broker File Review process is designed to provide brokers and their staff oversight of the transaction management workflow within TransactionDesk Edition.

The process uses transaction checklists to outline the tasks and documents expected to be completed at various workflow stages. For example, a checklist might require several documents to be attached to the transaction before approval. When the agent attaches a required document to a checklist item, they specify that it is ready for review, and the appropriate reviewer receives a notification.

When a checklist is created, the type of review required is selected.



The screenshot shows a 'Create Checklist Item' dialog box with a 'Close' button on the top left and a 'Save' button on the top right. Below the title bar are tabs for 'General', 'Access', 'Review', 'Task', and 'Assign', with a help icon (?) on the far right. The 'Review' tab is currently selected. Under the 'Review Options' header, there are four items, each with a checkbox to its right:

Review Options	
Staff Review	☐
Listing Review	☐
Closing Review	☐
Broker Review	☐

Types of reviewers

The following types of reviewers can be set up:

- Broker reviewer
- Staff reviewer
- Listing reviewer
- Closing reviewer

The number of reviewers set up depends mainly on the amount of oversight required by the brokerage and the size of the brokerage. For example, a small brokerage may set up a broker reviewer, and when the checklists are complete, the broker is notified and reviews the entire transaction. A larger brokerage may set up a staff reviewer to perform the initial review when the checklists are complete, with a final review by the broker before closing. A large brokerage may choose to have listing reviewers review transactions when a listing checklist is completed, separate closing reviewers responsible for reviewing all documents when a closing checklist is completed, an end-to-end review by a staff reviewer, and the final stamp of approval by the broker reviewer.

A broker reviewer is the only type of reviewer that can fully approve a document. All other reviewer types can only partially approve a document. For example, if a checklist item requires both a listing review and a broker review after the listing reviewer approves a document, it is partially approved. After the broker reviewer approves the document, it is fully approved. If the broker reviewer reviews it first, it becomes fully approved.

Choose the options that work best for your brokerage.

Notifications about reviews that are ready

When super-users set themselves up as a specific type of reviewer, they select the option to be notified via email when the checklist item is marked ready for that type of review.

Ways to review

There are two ways to access the documents that are ready for review:

1. Broker Tools > Broker File Review > Quick Review shows you only the documents ready for review. When you use the Quick Review option, you are presented with each transaction with one or more documents requiring review. You can review and approve or reject the documents in a transaction, then click Next to see the next transaction with documents to be reviewed. Use this method if you rely on reviewer roles and want to see only documents awaiting your review.
2. Broker Tools > Office Transactions shows all the office transactions. You can filter transactions with a specific status from the list and review the documents by transaction. Click the Review button to the right of the transaction to see the documents for review. Use this method if you do not rely on reviewer roles and prefer to work from a single page in TransactionDesk Edition.

Review multiple documents in bulk.

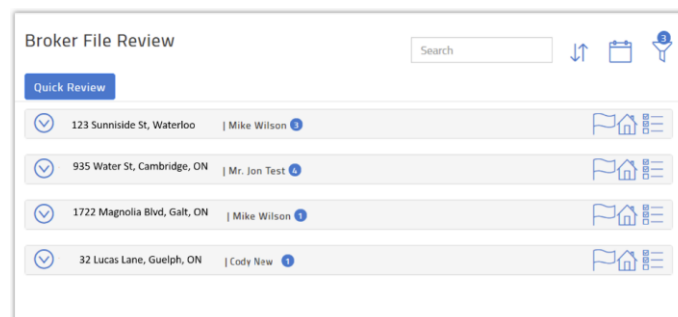
You can review multiple documents in bulk to save you time. You can review all documents awaiting review for all transactions or individual transactions.

You can review documents from Broker Tools > Broker File Review or from Broker Tools > Office Transactions, depending on how you want to work. If you want to see only those documents waiting for your review, you may find working from the Broker File Review page easier. If you want to be able to filter the list of transactions for a particular status first, then you may find it most straightforward to work from the Office Transactions page.

You must be logged in as a super user and set up as a document reviewer in Settings > Program Settings > Broker File Review.

Review all documents awaiting review.

1. Navigate to Broker Tools.
 2. Do one of the following:
 - Click Review Documents. You see the list of transactions with documents awaiting review.
- Note: If you do not see the Review Documents option, you are not set up as a document reviewer.



- Click Quick Review. This option lets you navigate from one document to the next quickly.
- Click Office Transactions. You will see the list of all the transactions in the office.

Transactions

Search

Offices ▾

Dates ▾

Types ▾

Statuses ▾

Sort ▾

Clear

Apply Filter

Create Filter

42698 Results

106 Richardson Dr

106 Richardson Dr

Residential Sale

Active

By: Kyle GreyBroker

Modified: 9/9/21 4:01 PM

Closing Date: 09/09/21

2 - Fully Approved

10 - Not Requested

Complete

21%

Review

180 Hill St

180 Hill St

- None -

Open

By: Kyle GreyBroker

Modified: 9/7/21 12:26 PM

1 - Submitted

1 - Rejected

3 - Fully Approved

2 - Not Requested

Complete

58%

Review

12 Greenoch Rd

- None -

Open

By: Kyle GreyBroker

Modified: 9/7/21 12:25 PM

1 - Fully Approved

Complete

100%

Review

You can filter the list of transactions to show only those transactions with a specific status by clicking the filter icon filter with no items selected. See Filter the List of Office Transactions (TransactionDesk Edition) for more details about filtering the list of transactions.

Click Review to the right of the transaction name to review all documents for a transaction.

Note: You are not set up as a document reviewer if you do not see the Review button next to the transaction.

Close Prev Next

CanAmara Parkway

Complete 0%

Documents (17) Details Notes (0)

Buyer Checklist

Buyer HOI Attach Mandatory

Signed PA Attach Mandatory

Fintrac Attach Mandatory

Purchase Agreement Requested Mandatory

Seller Disclosure Requested Mandatory

Amendments Attach

Overdue Tasks Checklist

Update Agent

Seller Disclosure

Page 1 / 15 Mandatory

THE ASSOCIATION OF REALTORS®

DISCLOSURE REGARDING REAL ESTATE AGENCY RELATIONSHIP

(Seller's Brokerage Firm to Seller) (As required by the Civil Code) (Form AD, Revised 12/18)

☐ If checked, this form is being provided in connection with a transaction for a leasehold interest exceeding one year as per Civil Code section 2071.5(a), (b) and (c).

When you enter into a discussion with a real estate agent regarding a real estate transaction, you should from the outset understand what type of agency relationship or representation you wish to have with the agent in the transaction.

SELLER'S AGENT

A Seller's agent under a listing agreement with the Seller acts as the agent for the Seller only. A Seller's agent or a subagent of that agent has the following affirmative obligations:

To the Seller: A fiduciary duty of utmost care, integrity, honesty and loyalty in dealings with the Seller.

To the Buyer and the Seller:

- (a) Diligent exercise of reasonable skill and care in performance of the agent's duties.
- (b) A duty of honest and fair dealing and good faith.
- (c) A duty to disclose all facts known to the agent materially affecting the value or desirability of the property that are not known to, or within the diligent attention and observation of, the parties. An agent is not obligated to reveal to either party any confidential information obtained from the other party that does not involve the affirmative duties set forth above.

BUYER'S AGENT

A Buyer's agent can, with a Buyer's consent, agree to act as agent for the Buyer only. In these situations, the agent is not the Seller's agent, even if the agent receives compensation for services rendered, either in full or in part from the Seller. An agent acting only for a Buyer has the following affirmative obligations:

To the Buyer: A fiduciary duty of utmost care, integrity, honesty and loyalty in dealings with the Buyer.

To the Buyer and the Seller:

- (a) Diligent exercise of reasonable skill and care in performance of the agent's duties.
- (b) A duty of honest and fair dealing and good faith.
- (c) A duty to disclose all facts known to the agent materially affecting the value or desirability of the property that are not known to, or within the diligent attention and observation of, the parties. An agent is not obligated to reveal to either party any confidential information obtained from the other party that does not involve the affirmative duties set forth above.

AGENT REPRESENTING BOTH SELLER AND BUYER

A real estate agent, either acting directly or through one or more subagents and broker associates, can legally be the agent of both the Seller and the Buyer in a transaction, but only with the knowledge and consent of both the Seller and the Buyer.

In a dual agency situation, the agent has the following affirmative obligations to both the Seller and the Buyer:

- (a) A fiduciary duty of utmost care, integrity, honesty and loyalty in the dealings with either the Seller or the Buyer.
- (b) Other duties to the Seller and the Buyer as stated above in their respective sections.

In representing both Seller and Buyer, a dual agent may not, without the express permission of the respective party, disclose to the other party confidential information, including, but not limited to, facts relating to either the Buyer's or Seller's financial position, motivations, bargaining position, or other personal information that may impact price, including the Seller's willingness to accept a price less than the listing price or the Buyer's willingness to pay a price greater than the price offered.

SELLER AND BUYER RESPONSIBILITIES

Either the purchase agreement or a separate document will contain a confirmation of which agent is representing you and whether that agent is representing you exclusively in the transaction or acting as dual agent. Please pay attention to that confirmation to make sure it accurately reflects your understanding of your agent's role.

The above duties of the agent in a real estate transaction do not relieve a Seller or Buyer from the responsibility to protect his or her own

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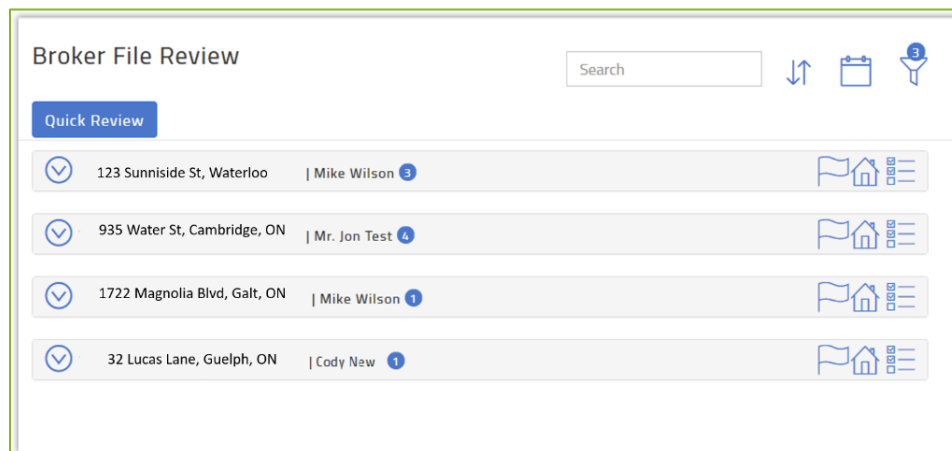
The list of documents appears in the left-hand pane. The document preview for the selected document appears in the central pane. Click the Details tab in the left-hand pane to see the transaction details. Click the Notes tab in the left-hand pane to access the transaction notes.

Note: you can update specific transaction details in the Details panel, such as the property type, and update a contact's details by clicking a contact name.

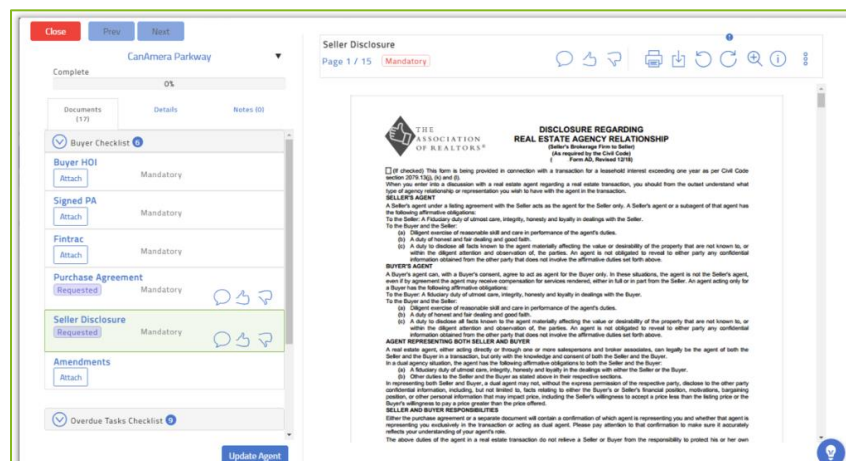
3. Click on a document to review it in the central pane.
4. Scroll to review the document. When ready, click thumbs up to approve it or thumbs down to reject it.
5. On the left, select the next document to review and repeat the approval or rejection process.
6. If applicable, click Update Agent to email the agent with the status of the checklist.
7. If you are reviewing from the Broker File Review page when reviewing the documents for one transaction, click Next to move on to the next transaction in the list. If you are reviewing from the Office Transactions page, scroll down to the next transaction you want to review.

Review documents for a single transaction.

1. Navigate to Broker Tools
2. Click Review Documents. You see the list of transactions with documents awaiting review.



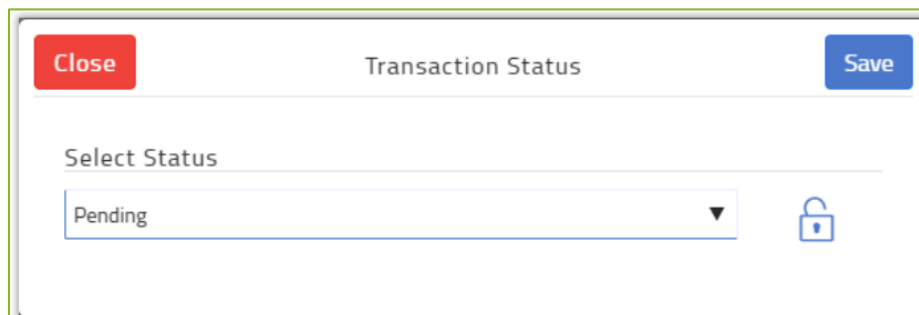
3. Expand the document list for the transaction you want to review by clicking the down arrow to the left of the transaction name.



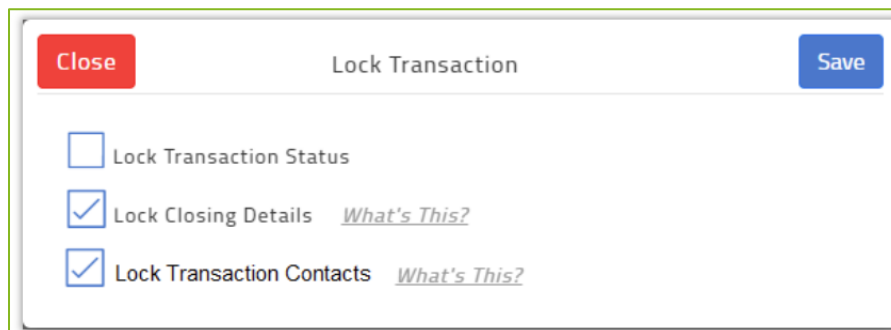
The list of documents appears in the left-hand pane. The document preview for the selected document appears in the central pane. Click the Details tab in the left-hand pane to see the transaction details. Click the Notes tab in the left-hand pane to access the transaction notes.

Note: you can update specific transaction details in the Details panel, such as the property type, and update a contact's details by clicking a contact name.

4. Click on a document to review it in the central pane.
5. Click on the more options menu of the first document and select Review Document.
6. While reviewing the document, you can do one of the following:
 - To approve the document, click the thumbs-up icon. The Notes page will appear, where you can add any notes to the document and click Save.
 - To reject the document, click the thumbs-down icon. If you reject the document, you may also want to reset the review process so it must be submitted again. Click the reset icon. The Notes page appears, where you can add notes to the document. Click Save.
 - To add a note to the document, click the notes, click Add, select the canned note text, type the note text, and click Save. The note is added to the list of notes for the document.
7. Continue to work through each transaction document, approving or rejecting them as appropriate.
8. To lock the transaction, preventing further changes to the transaction status or the closing details, do the following:
 - Click the flag icon to the right of the transaction name. The Transaction Status window appears.

A screenshot of the 'Transaction Status' window. It has a title bar with 'Close' on the left and 'Save' on the right. Below the title bar is a section labeled 'Select Status' containing a dropdown menu with 'Pending' selected and a small lock icon to its right.

- Click the lock icon. The Lock Transaction window appears.

A screenshot of the 'Lock Transaction' window. It has a title bar with 'Close' on the left and 'Save' on the right. Below the title bar are three checkboxes with labels: 'Lock Transaction Status' (unchecked), 'Lock Closing Details' (checked) with a link 'What's This?' to its right, and 'Lock Transaction Contacts' (checked) with a link 'What's This?' to its right.

- To lock the transaction status, select (check) Lock Transaction Status. This prevents changes to the transaction status by anyone who is not a super user. Note: If you need to change the transaction status after it is locked, you need to unlock the transaction status again to make the change.
- To lock the closing details, select (check) Lock Closing Details. This prevents anyone other than a super user from changing the closing details (list and purchase price, offer and closing dates, address and legal description, and, for Lone Wolf Link integration transactions, property type, and classification).
- Click Save.