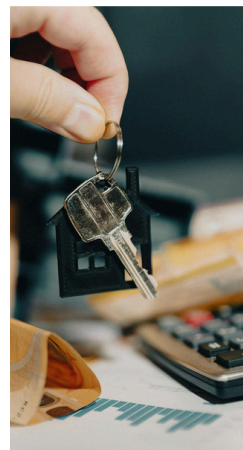




TRANSACTIONS

TransactionDesk Edition

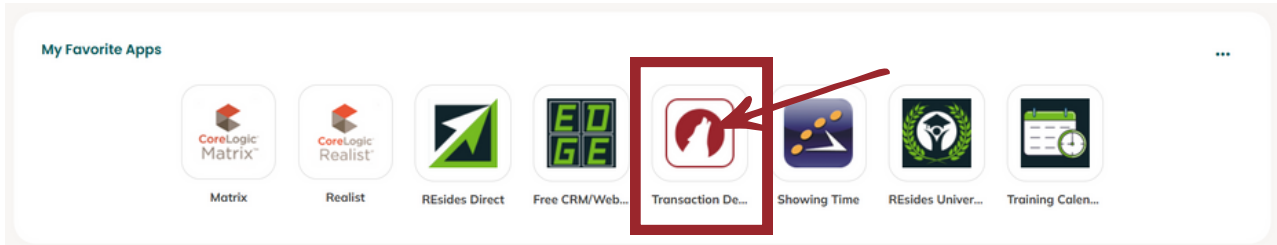
Adding Documents to a Listing from TransactionDesk



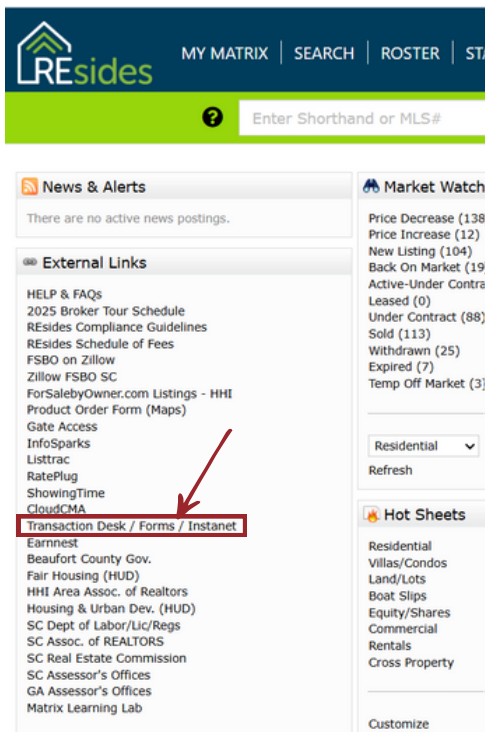


Accessing TransactionDesk

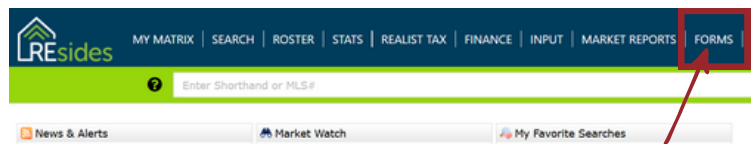
- Option 1 - Click the TransactionDesk icon.



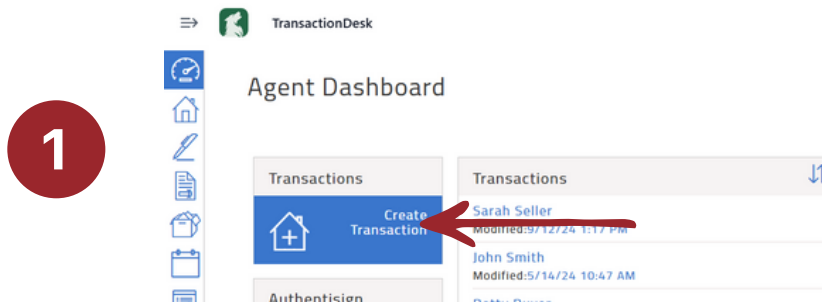
- Option 2 - Click on TransactionDesk in External Links on the Matrix dashboard.



- Option 3 - Click on Forms in the Matrix menu bar.



Click 'Create Transaction' - Example 1





If the transaction is already created, select it from the list. - Example 2

2

TransactionDesk

Agent Dashboard

Transactions

Create Transaction

Authentication

Start Signing

Transactions

Sarah Seller
Modified: 9/12/24 1:17 PM

John Smith
Modified: 5/14/24 10:47 AM

Betty Buyer
Modified: 5/10/24 12:08 PM

Go to Transactions

Forms

Listing Input Sheet: Residential
Modified: 2/6/25 11:42 AM

Listing Input Sheet: Villa/Condo
Transaction: Sarah Seller
Modified: 9/12/24 1:16 PM

Listing Agreement - Exclusive
(Rev. 04/202024)

Go to Forms

Click 'Go to Transactions' to expand the list.

From the transaction, click the ellipsis menu.

TransactionDesk

Sarah Seller

Start CMA

Address: 107 Okatie Highway, Okatie

Buyer:

Agent: Sharon Crawford

Open

Listing #: 439334

Seller: 107 Okatie LLC

Transaction Dashboard

Detail Overview

LIST: Villas/Condos

Status: Open

Address:

Forms

Listing Input Sheet: Villa/Condo/(
Rev. 10/20)

Modified: 9/12/24 1:16 PM

Delete Transaction

Teams/Share

Notes

Duplicate

Apply template

Create template

Import data

Archive...

Change Transaction Status

Next, select 'Import Data.'



In the Select Source field, click on REsides MLS.

Close Import

- Select Source -
- Select Source -
Realist (Hilton Head)
REsides MLS

☒ Automatically populate forms?

1. Enter the listing's MLS Number in the corresponding field.

Close Import

REsides MLS

1 MLS Number

☒ Automatically populate forms?

2 Import

2. Click the Import button, as seen above.