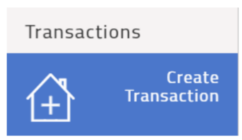
Create a Transaction in TransactionDesk

Describes how to:

- Create a transaction in TransactionDesk using the MLS number to pull in the listing information from the REsides listing
- Create a template to pull in forms and documents required for the transaction

You can manually add a transaction by entering 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.

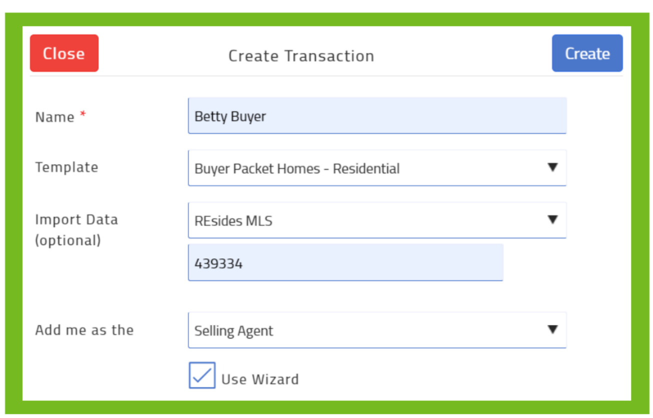
1. Click on Create Transaction.



2. In the Name field, enter a name for the transaction. Typically, this is the street address of the property.

3. Use the Template dropdown to select the appropriate template to add a checklist, forms, and documents automatically.

4. Use the Import Data dropdown to select a source of information for the transaction. You may choose REsides or Realist. If you select REsides, you'll be prompted to enter the MLS number. If you select Realist, you'll be prompted to select the county, then enter the property's Tax ID.

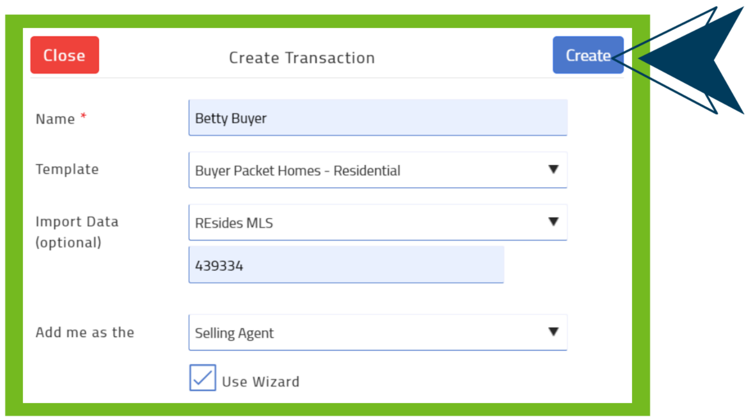


Example: creating a Buyer Packet

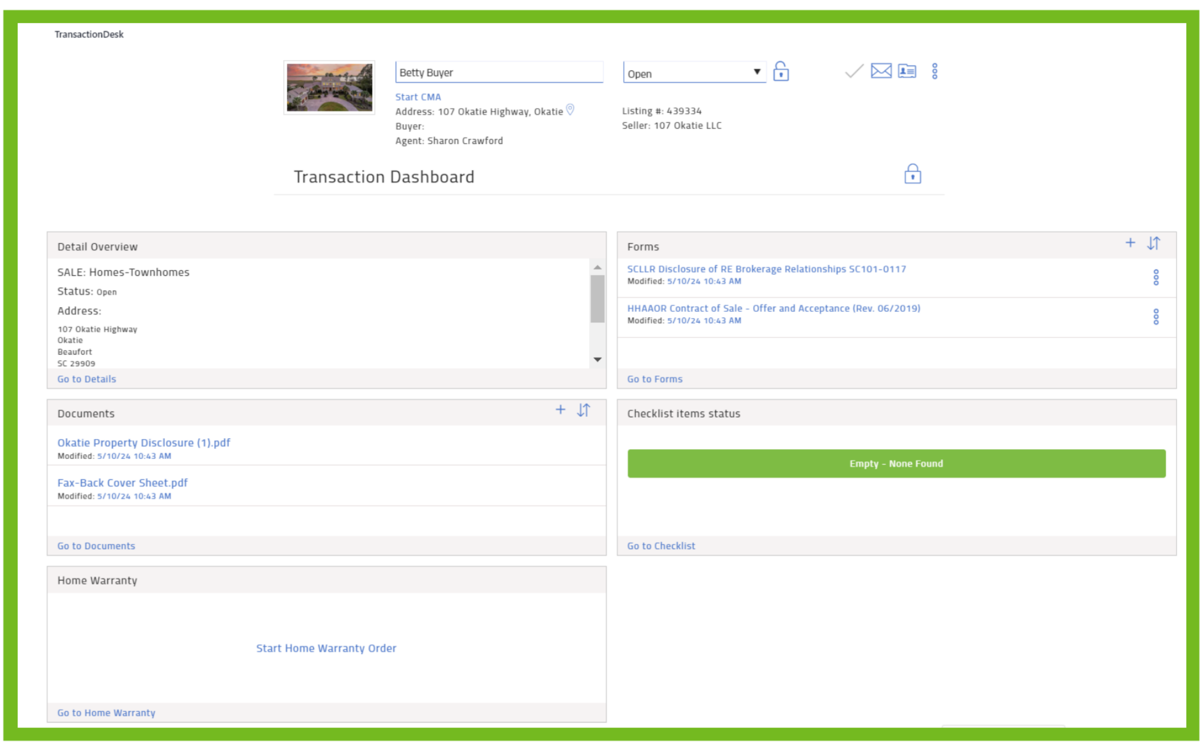
5. Click the ‘Add Me as the’ dropdown arrow to select your role in the transaction. Choose from Listing Agent, Selling Agent, Neither, or Both.

6. Check the ‘Use Wizard’ box to create the transaction using a guided walkthrough.

7. Click ‘Create’.



If you use the Wizard, it will open, as seen below. If you imported information from REsides, much of the listing information is populated automatically from the MLS listing.

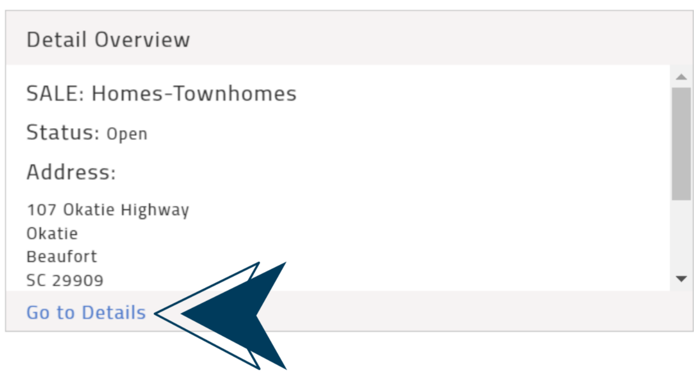


Example: Buyer Transaction Wizard

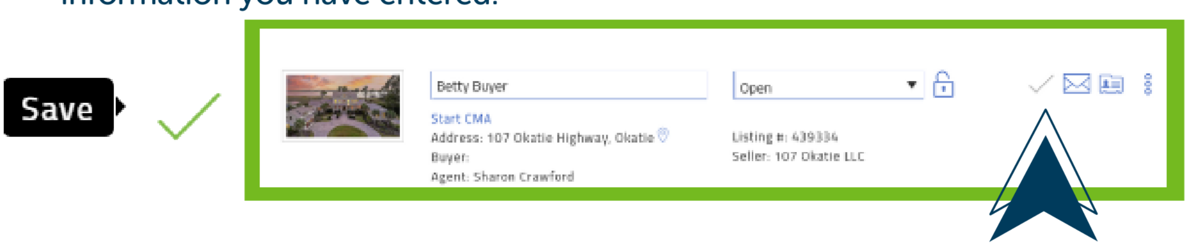
8. At the top of the page, you can do any of the following:

- 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
- Click 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 1: From this point, you can complete the sections in any order. In the Detail Overview section, click ‘Go to Details’. It’s very important to enter as much information as possible.



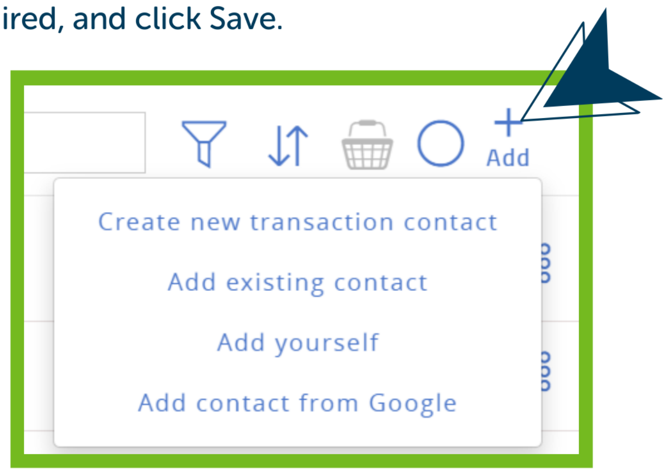
Remember to click the checkmark at the top of each section’s page to save the information you have entered.



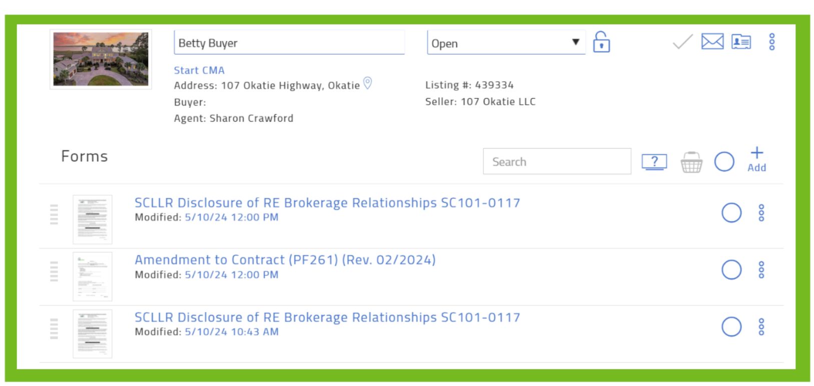
9. Click ‘Next’ or Contacts on the right side of the screen. When the contacts page opens, you’ll see all the contacts associated with the transaction. If you added yourself to the transaction, your name appears. Other contacts are populated from the MLS listing.

10. To add a contact to the transaction, click Add, and do one of the following:

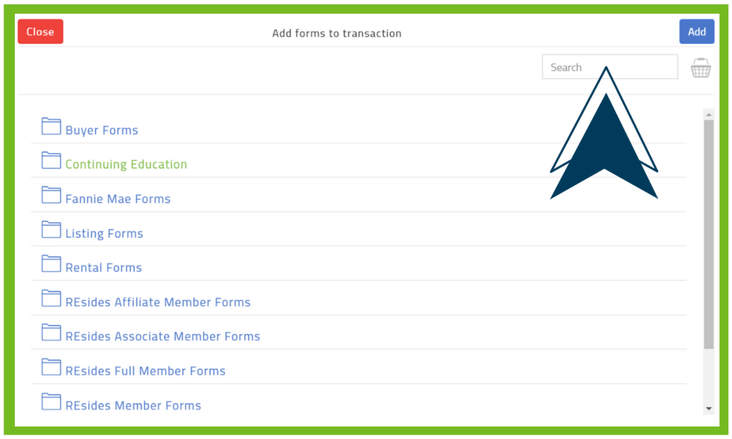
- Select Create New Transaction contact to create a new contact in the transaction. Provide the required information and add the contact to your list of contacts, ensuring the Add to Address book is checked. Click Save.
- Select Add existing contact to add a contact to the transaction from your existing list of contacts. Check one or more contacts from the list that appears, and click Add. Add any additional information required, and click Save.
- Select Add Yourself to add yourself to the transaction. Add any additional information required, and click Save.
- Select Add a 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.

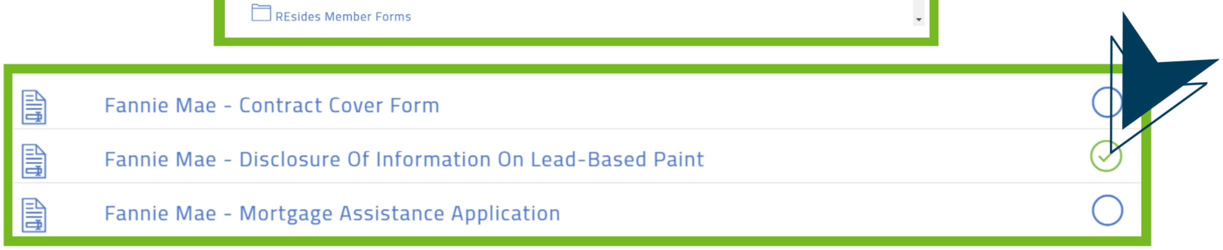


11. Now, select ‘Forms’ from the right-hand side of the screen. When the Forms page opens, any forms associated with the transaction through the template are listed here.



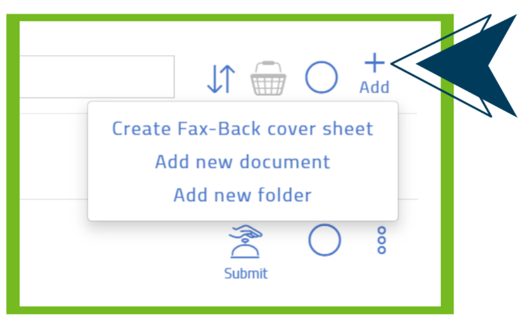
12. To add more forms to the transaction, click Add. When the 'Add Forms to Transaction' page opens, scroll through the folders, locate the form(s) you want to add or search for the form by name in the Search box.



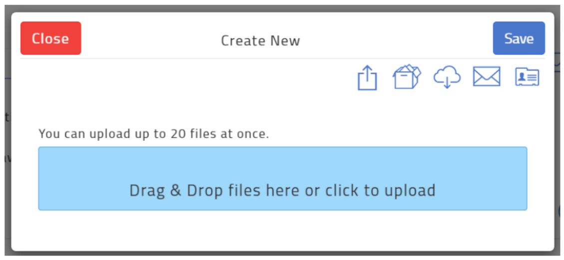


When you locate a form you want to include, use the selection box to the right of the form name to select the form for inclusion in the transaction, and click Add.

13. Click 'Documents' on the right-hand side of the screen. When the Documents page opens, you'll find a list of documents associated with the transaction. Any documents you want to add to the transaction file, such as property disclosures, maps, or any other documents, can be uploaded here.



14. Click ‘Documents’ on the right-hand side of the screen. When the Documents page opens, you’ll find a list of documents associated with the transaction. Any documents you want to add to the transaction file, such as property disclosures, maps, or any other documents, can be uploaded here.



15. Do one or more of the following:

- To upload a document from your computer, click the upload icon(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 the Documents icon. Then, navigate to and select the appropriate document, and click Save.
- Click import from the cloud icon to import a document from Dropbox, Google Drive, or another third-party document storage system. 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 icon. 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 it, click the contact card icon. This adds an email contact to your email. In the future, you can email documents directly to this contact, and the documents are attached automatically to the transaction.

16. Click ‘Done.’