

Create a Transaction in TransactionDesk

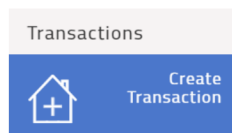


Describes how to:

- 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.

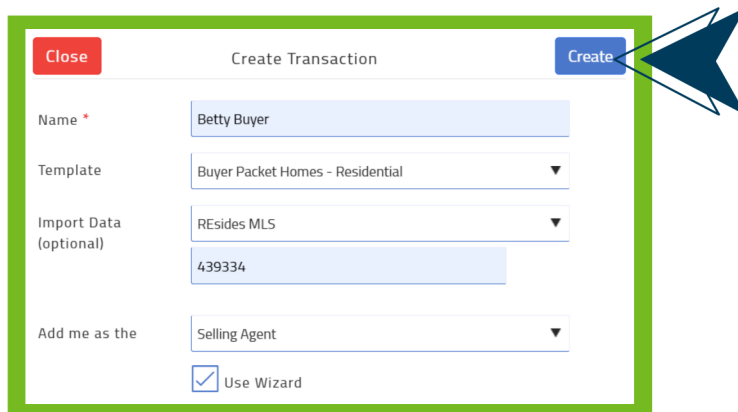
3. Use the Template dropdown to select the appropriate template to add a checklist, forms, and documents automatically.

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.

A screenshot of the "Create Transaction" form in TransactionDesk. The form is titled "Create Transaction" and has a "Close" button on the top left and a "Create" button on the top right. The form contains several fields: "Name" with a red asterisk, "Template", "Import Data (optional)", and "Add me as the". The "Name" field contains "Betty Buyer". The "Template" dropdown menu is set to "Buyer Packet Homes - Residential". The "Import Data" dropdown menu is set to "REsides MLS", and the field below it contains "439334". The "Add me as the" dropdown menu is set to "Selling Agent". At the bottom, there is a checkbox labeled "Use Wizard" which is checked.

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'.



Create Transaction

[Close](#) [Create](#)

Name *

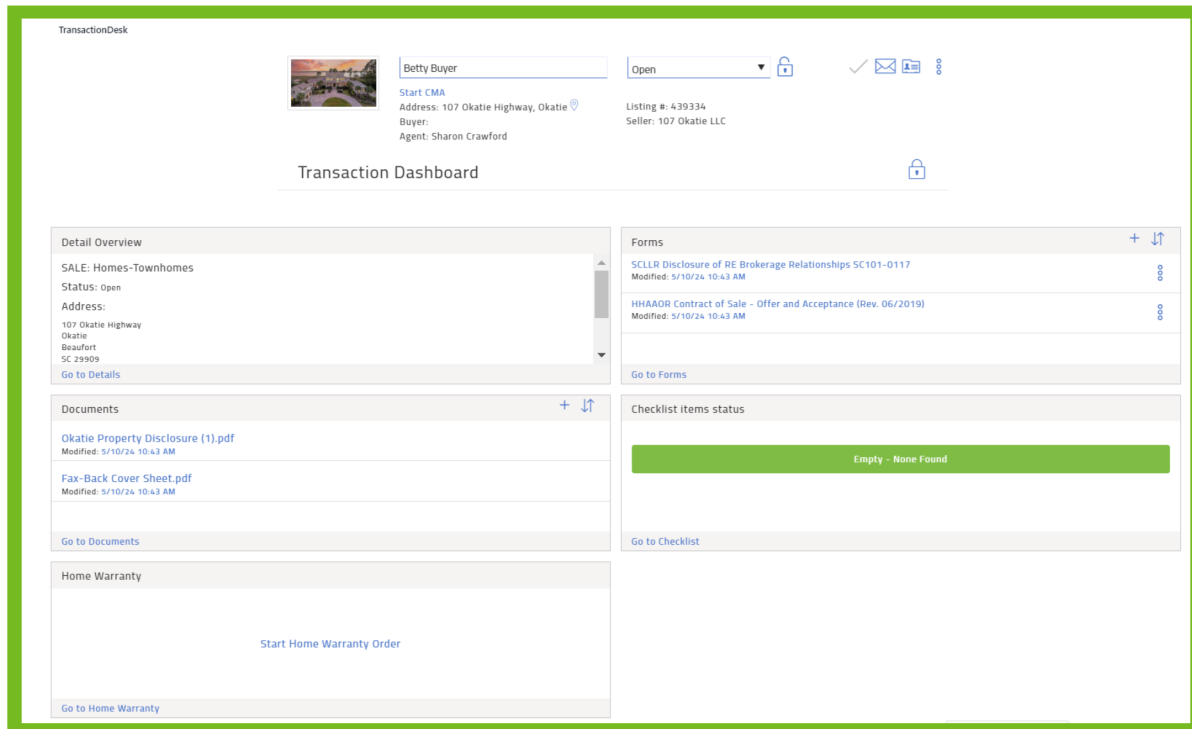
Template

Import Data (optional)

Add me as the

☒ Use Wizard

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.



TransactionDesk

[Start CMA](#)
Address: 107 Okatie Highway, Okatie 
Buyer:
Agent: Sharon Crawford

Listing #: 439334
Seller: 107 Okatie LLC

Transaction Dashboard 

Detail Overview

SALE: Homes-Townhomes
Status: Open
Address:
107 Okatie Highway
Okatie
Beaufort
SC 29909
[Go to Details](#)

Documents  

[Okatie Property Disclosure \(1\).pdf](#)
Modified: 5/10/24 10:43 AM

[Fax-Back Cover Sheet.pdf](#)
Modified: 5/10/24 10:43 AM

[Go to Documents](#)

Home Warranty

[Start Home Warranty Order](#)

[Go to Home Warranty](#)

Forms  

SCLLR Disclosure of RE Brokerage Relationships SC101-0117
Modified: 5/10/24 10:43 AM

HHAADR Contract of Sale - Offer and Acceptance (Rev. 06/2019)
Modified: 5/10/24 10:43 AM

[Go to Forms](#)

Checklist items status

Empty - None Found

[Go to Checklist](#)

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.

Detail Overview

SALE: Homes-Townhomes

Status: Open

Address:

107 Okatie Highway

Okatie

Beaufort

SC 29909

Go to Details



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

Save



Betty Buyer

Start CMA

Address: 107 Okatie Highway, Okatie

Buyer:

Agent: Sharon Crawford

Open

Listing #: 439334

Seller: 107 Okatie LLC



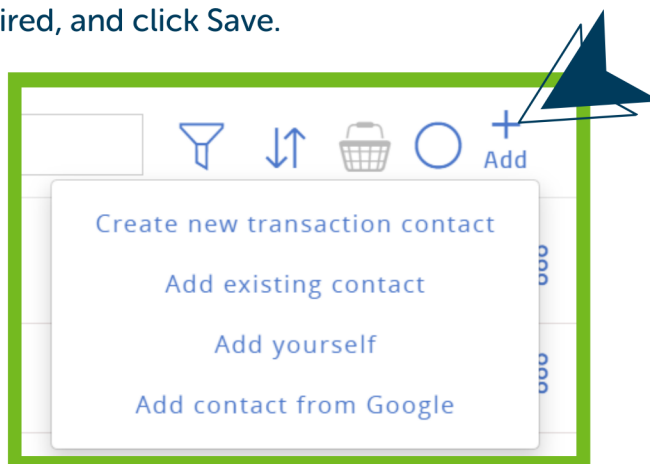




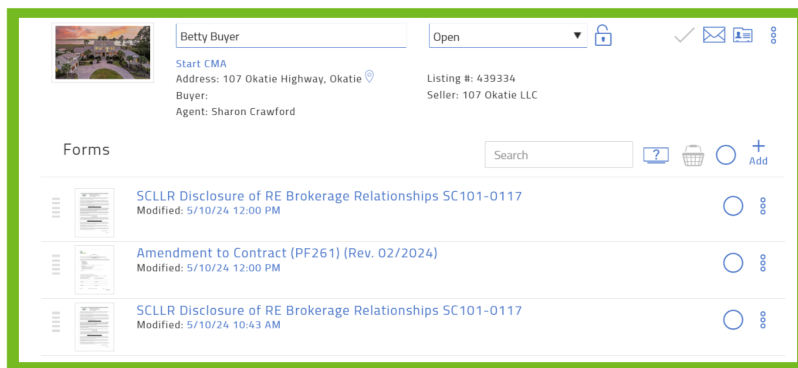

9. Click 'Next' or Contacts on the right side of the screen. When the contacts page opens, you'll see all the contacts associated with the transaction. If you added yourself to the transaction, your name appears. Other contacts are populated from the MLS listing.

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

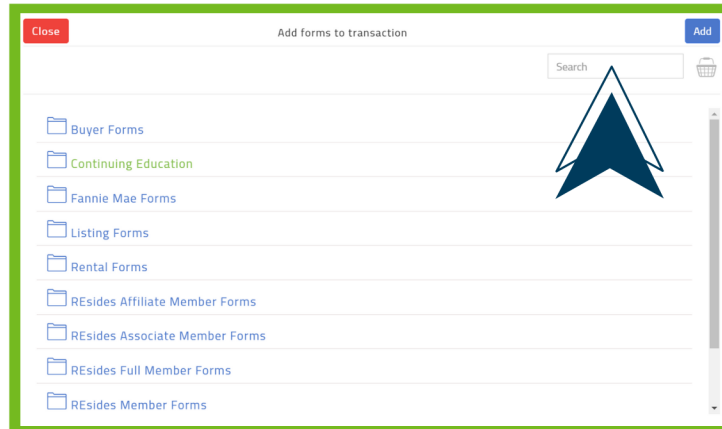
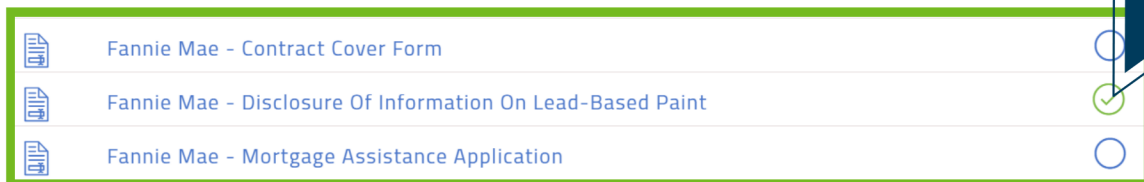
- Select Create New Transaction contact to create a new contact in the transaction. Provide the required information and add the contact to your list of contacts, ensuring the Add to Address book is checked. Click Save.
- Select Add existing contact to add a contact to the transaction from your existing 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.

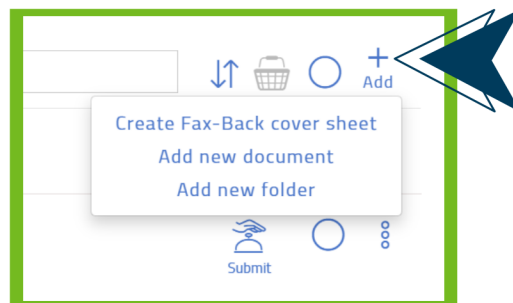


12. To add more forms to the transaction, click Add. When the 'Add Forms to Transaction' page opens, scroll through the folders, locate the form(s) you want to add or search for the form by name in the Search box.

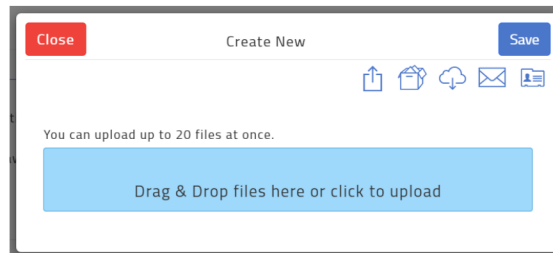



When you locate a form you want to include, use the selection box to the right of the form name to select the form for inclusion in the transaction, and click Add.

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.'