



## Associates Top 10 Things to Know

### **1. Start a Transaction**

When you are ready to write a purchase contract or listing agreement, start a new transaction. A transaction is similar to the paper file you use today. It will save you a considerable amount of time because all the forms and contracts you add to the transaction file will be auto-populated with the data you import or type into the transaction.

### **2. Import MLS Data**

You can import MLS data from your local MLS right into a transaction file. This process will save you time by reducing the amount of information you have to type: such as, property information, listing agent and broker information, etc. You can import MLS data into a transaction simply by entering the MLS number when you begin the transaction, or later by selecting '*I would like to: Import MLS data*' from the main transaction screen.

### **3. Create Quick Start Groups for Commonly Used Forms and Contracts**

You can create a Quick Start Group in just a minute or two. Go to the *Settings tab* and then click on *Quick Start Groups*. You will be able to create custom groups of forms and have the system automatically attach that group of forms to certain transaction types such as listings, sales or leases. Next time you start a new transaction file, the forms you want will automatically be added to that transaction and the forms will automatically be populated with the data that you've added to that transaction.

### **4. Give Your Buyers, Sellers and Service Providers the FaxBack Cover Sheet**

For every transaction you create, TransactionDesk™ will automatically add a fax back cover sheet to the transaction file. You can now email, fax or print (then deliver) the faxback coversheet to anyone you expect to give you transaction related documentation. When they fax you the documents, the received pages will be automatically filed in your TransactionDesk™ transaction file as an Adobe PDF. The document will also be emailed to you so you know the fax has been sent to you.

### **5. TransactionDesk™ allows you to Share Documents Online with Clients, Service Providers and Other Agents**

When you create a new transaction and add contacts (buyers, sellers, etc.) to the transaction, you can choose to make that contact a transaction participant. You can then grant that person access to the specific items you want – certain forms, documents, contact information for certain parties, etc.

The new participant will receive a branded email invitation from you that will allow them to login your branded Customer Service Portal.

**6. Personalize Your Account and Make Sure Your Email Address is Correct in TransactionDesk™**

Upload your photo and it will display on all emails coming from your TransactionDesk™ account. The photo will also display on your Customer Service Web Portal when clients and service providers log into the system to retrieve or upload documents (if you give them the permission to do so). You can perform the upload by going to the settings tab and then clicking on the branding box.

You will also get an email confirmation that all the faxes you send from TransactionDesk™ were sent successfully (and also be notified if they were not). Make sure we have the correct email for you! By going to *Settings>My Preferences>User Information* you can see what email address we have on record for you. If you need to update it, change it in your 'Agent Intranet Account' and the change will be made in TransactionDesk™ the next time you log in. You can also set an email signature used by the system. To do so, go to *Settings>My Preferences>Email Signature*. You will be notified by email of all faxes coming into the system (and you'll get a PDF copy of the fax, too!).

**7. The Clause Editor Allows you to Paste Commonly used Verbiage into your Contracts and Forms**

If you have any verbiage you often write or type into contracts, there is a better way to do it! You can add personal clauses to TransactionDesk™ and Forms On-Line Gold™ (available only to you) and then paste those clauses right into a form or contract. Go to *Settings>Clauses* and add the clauses there. TIP: Write the clause in a word processor such as Microsoft Word (or even your email program) so you can spell-check the clauses first.

**8. You can Share Transaction Files with Others in Your Offices (Your Business Partner or Team)**

If you work with others in your office and what to share access to common transaction files, simply share the transaction when you are setting up a file in the Transaction Wizard (You can also share a file later, by clicking on the Sharing link in the transaction overview screen.

To set-up sharing just go to *Settings>Sharing* and create the 'shares' for people with whom you'll want to share transactions. Keep in mind that only people in your office and only the ones who have logged into TransactionDesk™ will be visible in your office list when you are creating the 'share'.

**9. You Can Give Your Clients a PDF of all Transaction Documents**

At the end of the transaction you can create a single PDF of all the transaction file documents. TransactionDesk™ can create a PDF 'package', a single PDF file made up of multiple files that you can deliver to your client by email or burning it to a CD. Simply go the transaction and from the '*I would like to*' drop down menu select *Package Forms/Document'*, click *go* and follow the prompts.

**10. Create Your Own Custom DocBox™ Folders and Store Any Documents You Want Online**

In TransactionDesk™ you can add your own custom folders. This allows you to store documents other than transaction specific documents (marketing material, licensing documents, non-transaction specific real estate documents, etc.). Once you create the folders and upload documents, you will be able to access them from virtually any internet connected computer. No more worrying about which computer you have stored important documents.