TransactionDESK®

App

May 30th, 2017

Creating a Transaction on the App

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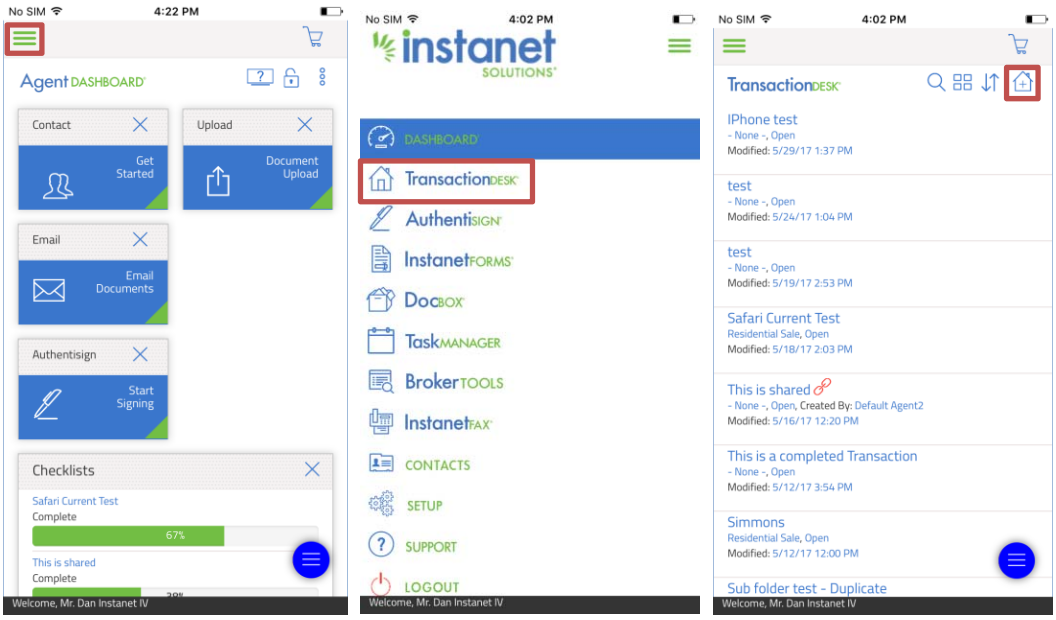
Creating a Tranaction on the App

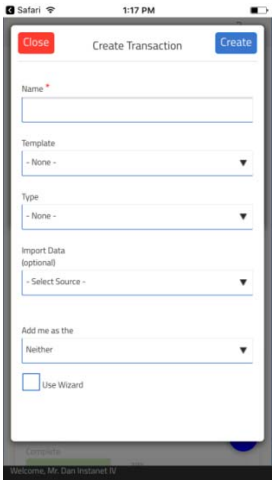
Below is an overview of how to create a Transaction on the App. We will look at creating a basic transaction from scratch, creating a transaction from importing a MLS number and how to create a transaction by importing a tax data record.

- To start get logged into the App. You will automatically land on your “Agent Dashboard” screen. This is just an overview page of everything happening in your account.
- Go ahead and click the Hambuger button in the top left hand corner to expand the menu and tap TransactionDesk.
- This will bring you to your transaction page. Go ahead and hit the house icon with a plus sign inside of it to start your transaction as shown below.



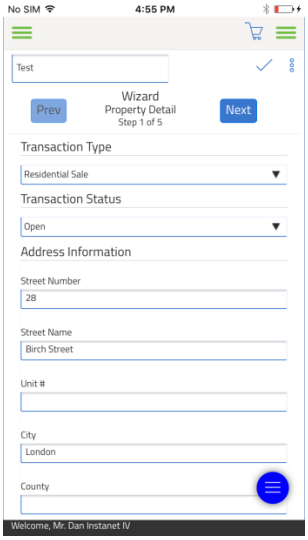
- Now that the create transaction dialog screen has come up. Go ahead and give it a name.
- If you have any transaction templates created you can go ahead and use this drop down to select one.
- Use the type drop down to select what type of transaction is. Don’t worry about the import data drop down for now.
- Finally go ahead and pick yourself as either the listing, selling agent, both or neither. Depending on what you select it will automatically create a contact in your transaction based off of that selection (Ex. if you pick listing agent, it will create a listing agent contact for you)

- Finally go ahead and check off the “use wizard” option. This will bring you through a quick 5 step process to set up your Transaction File. As you get more familiar with creating them you can leave it un-checked.
- Once you have everything filled out, go ahead and hit create in the top right hand corner to create the transaction.

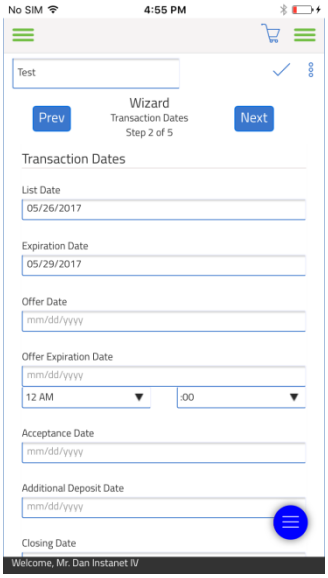


Now that you have created the transaction it will land you in the wizard to start. Screenshots below show the different wizard steps you will see.

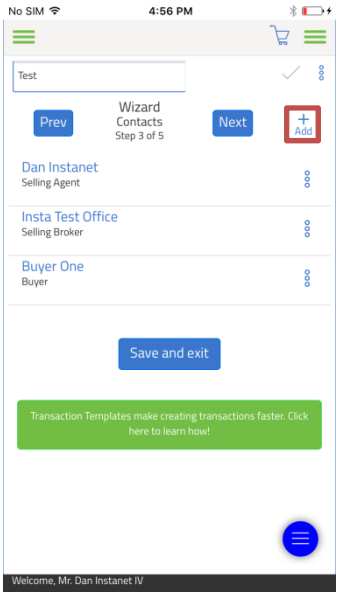
- Step 1 – Details: go ahead and fill in the property details as much as you can. The idea behind the details section is when you add forms to your transaction it will try to fill in as many fields as it can from this section. Just tap a tap a field and start typing the information in.



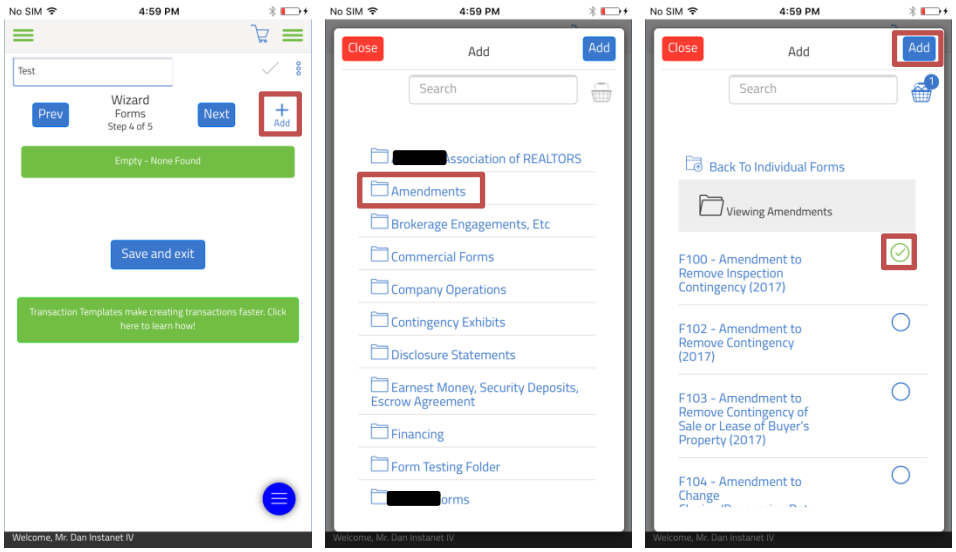
- Step 2 – Transaction Dates: Again go ahead and fill in as many of the dates as you can, this is similar to step 1 and will try to populate any forms in the transaction with those dates. Just tap a date field and a Calendar will pop up to select a date.



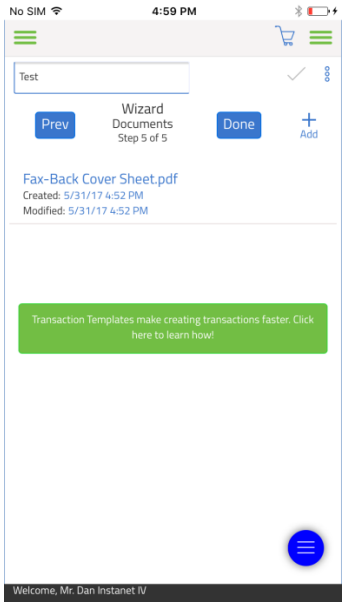
- Step 3 – Contacts: Go ahead and add the contacts that you will be using in this transaction by hitting the "Add +" icon (if you picked yourself as listing or selling agent in the beginning you will already be created in here. I chose selling agent on mine, so I now have an agent and broker contact created in my name and my office name). We use this screen to populate any name fields where applicable into the forms that are attached to this transaction.



- Step 4 – Forms: Go ahead and add the forms that you want in this transaction. When you hit the "Add +" icon you will first see a list of all the form folders to pick from. Tap a folder name and it will show you all the forms grouped into that folder. Now check off the forms you want and tap add in the top right hand corner. (You can also use the search bar to search for forms as well)

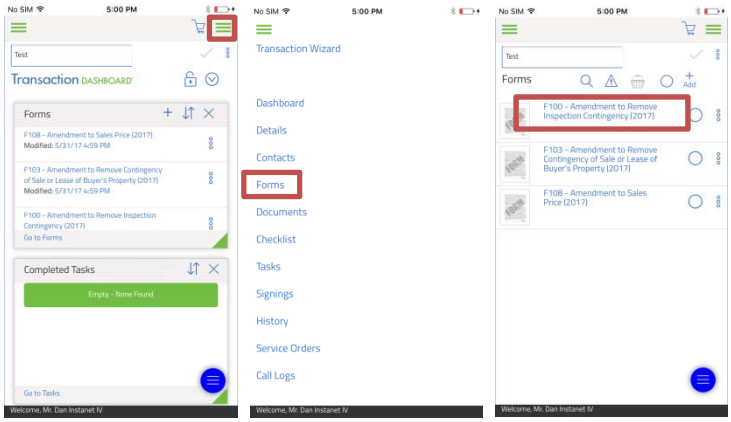


- Step 5 – Documents: In this step go ahead and add any documents that you want to store with this Transaction file. This won't populate any of your forms but this might be things like a land survey map or property disclosure and so on that you might want to store with the transaction file itself. Just hit the "Add +" icon to add a document or folder.



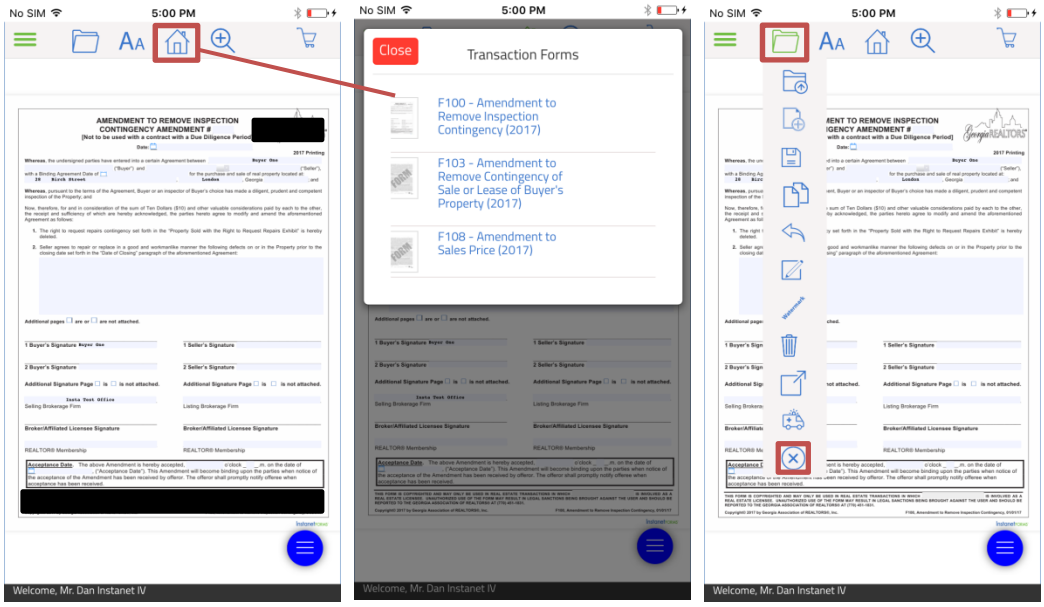
Now that you have completed the steps and finished the wizard you will be re-directed to the transaction Dashboard screen. This is a page giving you an overview of what is happening in all the sections of the transaction. You can tap a form name here to start working on it or you can hit the hamburger button on the right to jump to the different sections. Just keep in mind the dashboard screen just displays basic information but the individual sections themselves is where you can get the full management options for each of your items.

- Just tap the name of a form on either the dashboard screen or in the forms section to open the form and start filling it out.



Once the form is opened you will not be in the form editor itself. If you filled out the property details, transaction dates and contacts section, a lot of your form will already be pre-filled for you. At this point you just need to fill in the blanks.

- If you hit the house icon it will display a short cut menu to jump to all the different forms in your transaction.
- Lastly if you hit the folder icon this will display menu options that you can take on the form. Example, if you hit the "x" it will log you out of the form and back into your transaction.



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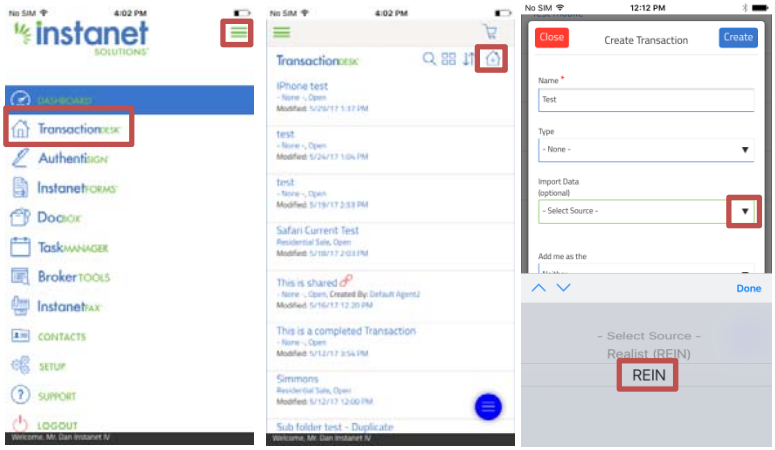
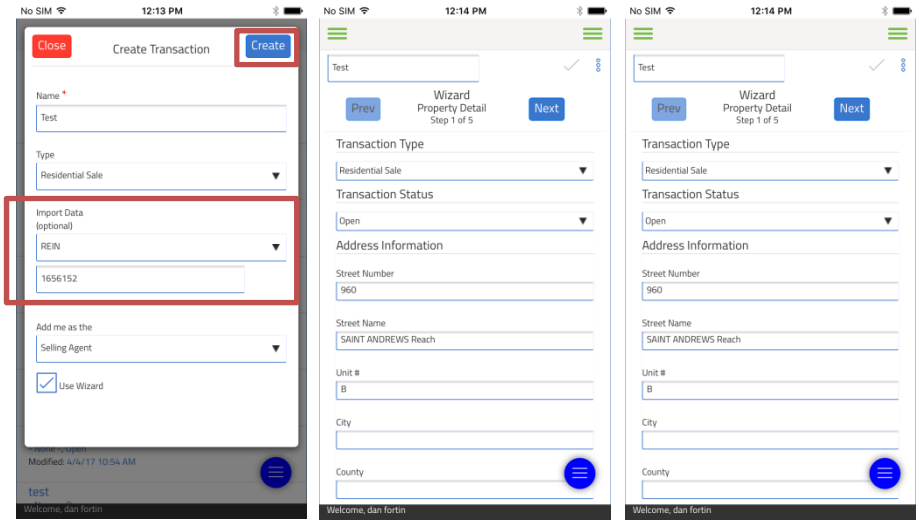
Now that you know how to create a basic Transaction we will show you how to create a transaction again but this time we will import MLS/Tax data information into the transaction. (The data sources you will see will depend on what association you are with).

- To start lets go back to your main transaction page.
- Go ahead and click the Hambuger button in the top left hand corner to expand the menu and tap TransactionDesk.
- This will bring you to your transaction page. Go ahead and hit the house icon with a plus sign inside of it to start your transaction as shown below.
- Now when you have the initial transaction creation page open, fill in the details like you did before but this time for the data source hit the dropdown. Now you generally have two options in here. Import from the MLS or import from a tax data source. Each associations data import screens will look different and be named differently.



- Use the drop down and select the MLS import source (this MLS import option is called “REIN”). Now choose the property type if applicable and punch in your MLS number and hit create.
- Now when you go to the first step of the wizard you will notice it brought in all the property information it could from the MLS. Now since these sections are filled out it will also populate your forms quicker. That is all you have to do to import from the MLS.



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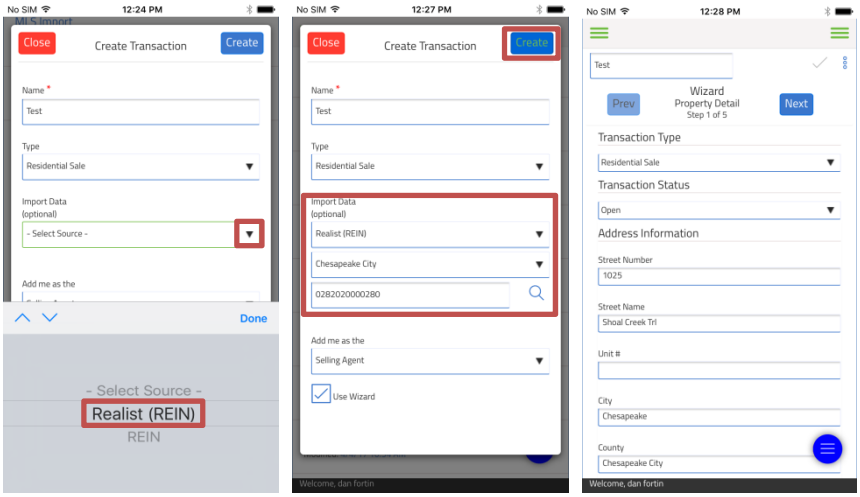
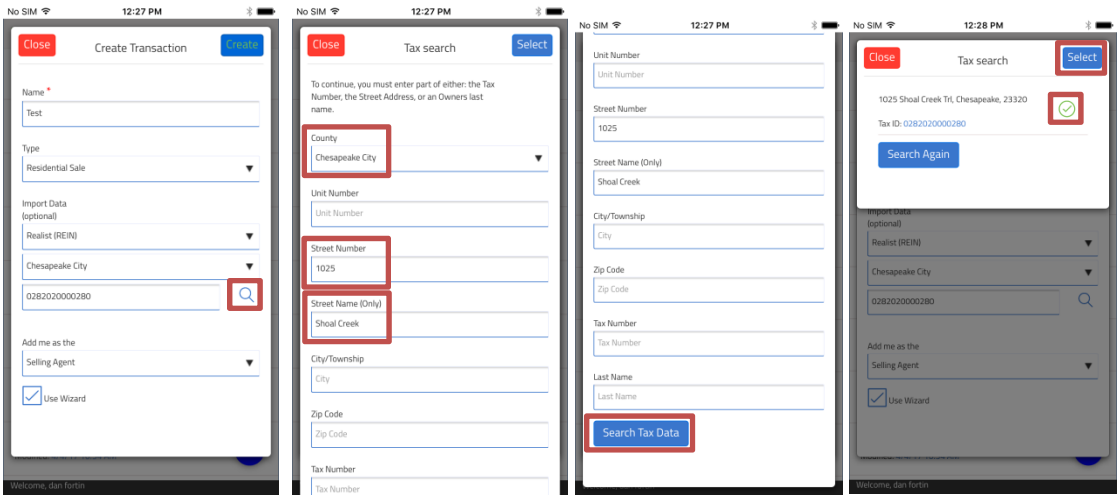
Next going back to that create transaction screen lets look at the import from tax data source option.

- Go ahead and use the drop down and select the tax data source to import from.
- Now if you know the tax number and county already go ahead and punch it in and tap the create button.
- Now when you hit create it will also populate the details and contacts section which in turn will populate your forms. As you can see in the last screenshot or step 1 of the wizard.



- If you don't know the tax ID go ahead and hit the magnifying glass icon to do a property address search. All you need to know is the county, street number and street address. When entering the street address do not include the street suffix just put the streetname. (You can search by owner last name as well).
- Now scroll down and hit search Tax Data. When the tax search screen returns the results select the property you are looking for and hit select.



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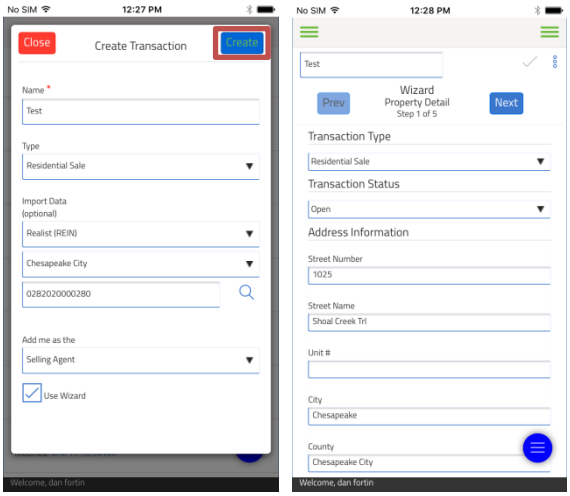
- Once you hit select it brings you back to the create transaction screen with the county and tax ID now populated for you. Just hit create and it will create the transaction for you and populate the property information into your transaction.



That is all you need to know to create a transaction and fill in your forms.