TransactionDESK®

App

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Managing Transaction
# Templates
in the App

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Managing Transaction Templates in the App

This guide is an overview of how to manage and create your transaction templates in the App. There are two types of templates: Transaction Templates and Checklists. We are going to go through the Checklist Manager first and later the Transaction Templates. Main reason is you can link your checklist to your template so it makes sense to go in this order.

- Hit the hamburger button in the top left hand corner and then tap setup from the left hand menu. This will bring you to the setup options where you can manage your templates.
- Tap the option that says "Checklist Manager".
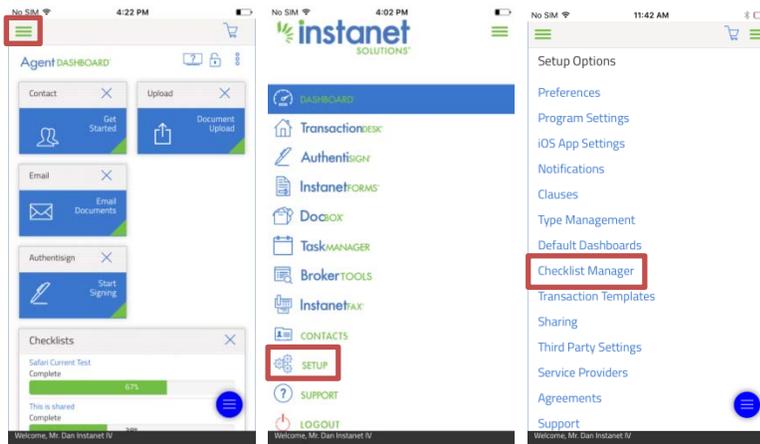
Now you will be re-directed to the Checklist Manager section. There are a few options in here to choose from.

- As seen in the second screenshot the ellipses menu lets you copy, view or delete a checklist.
- Or you can use the filter icon to filter by the different permission levels of checklists.
- Fourth screenshot shows you can sort by name.

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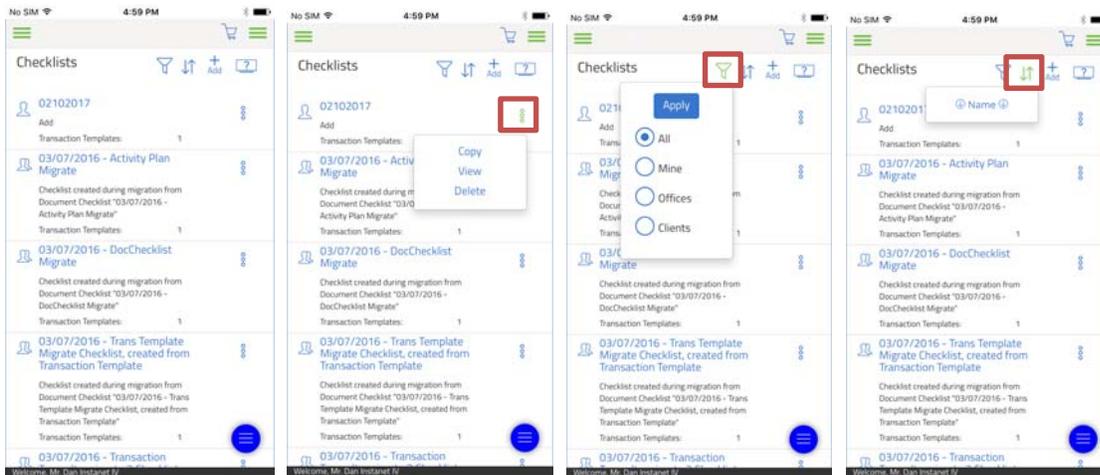
To get started we are going to create a new one. Just hit the "Add +" icon near the top right hand corner. (Note: you will only see the ownership dropdown if you are a super user). Go ahead and name it and hit save.
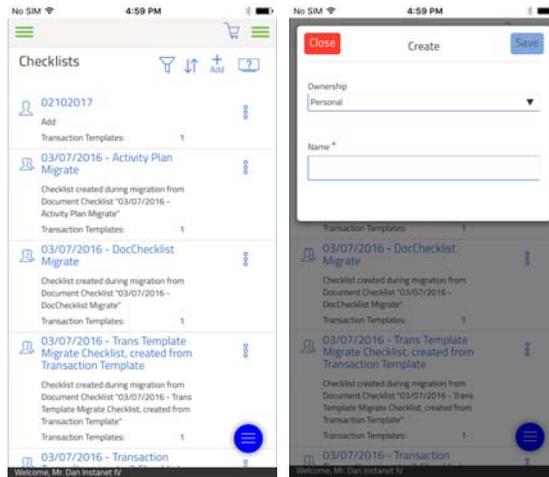

Once you have the new checklist saved and created you will land on the first screenshot.

- Go ahead and hit the "+" icon under the checklist item section to create a new checklist placeholder.
- On the checklist item create screen choose whether it will be a document, a task or both and give it a name.
- Use the review and task tabs at the top to choose who will review it and the due date options if you made it as a task.
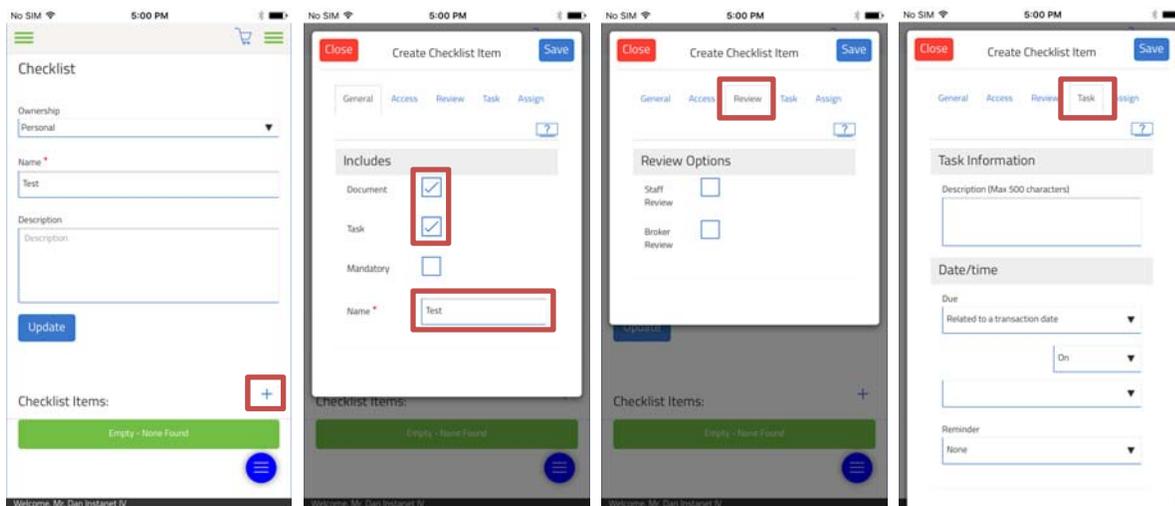
Once you have it created you will now see the placeholder in your checklist item section, you can create as many as you want by hitting the plus icon again.
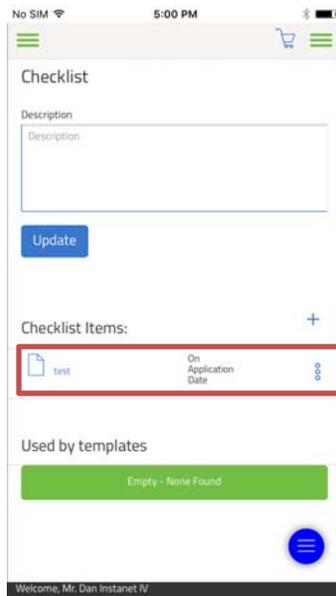

Now that we have a checklist created lets create a template and we can link our checklist to it. Hit the hamburger button on the right and tap transaction templates.
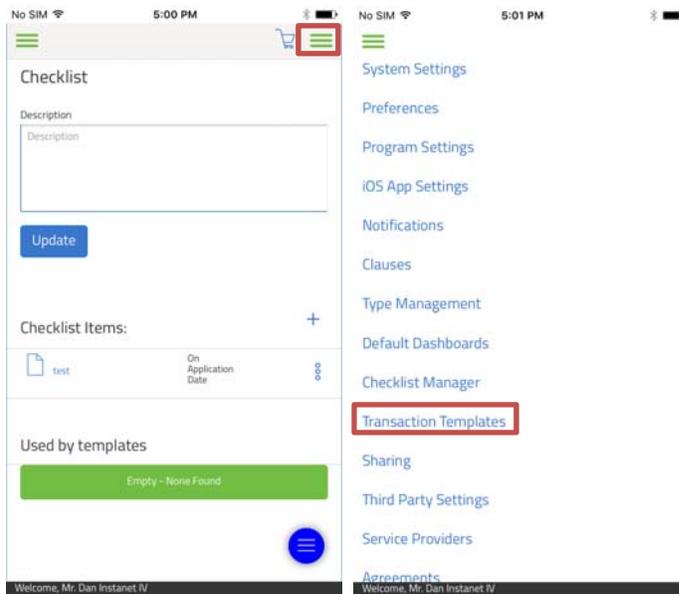
You will land on the transaction template screen to begin with. There are a few sort options in here as well to take note of.

- ■ The ellipses menu will let you copy, edit and delete. If you don't own the template edit will say view instead.
- ■ The filter icon will let you sort by different template permission levels.
- ■ And the sort icon lets you sort it by name.
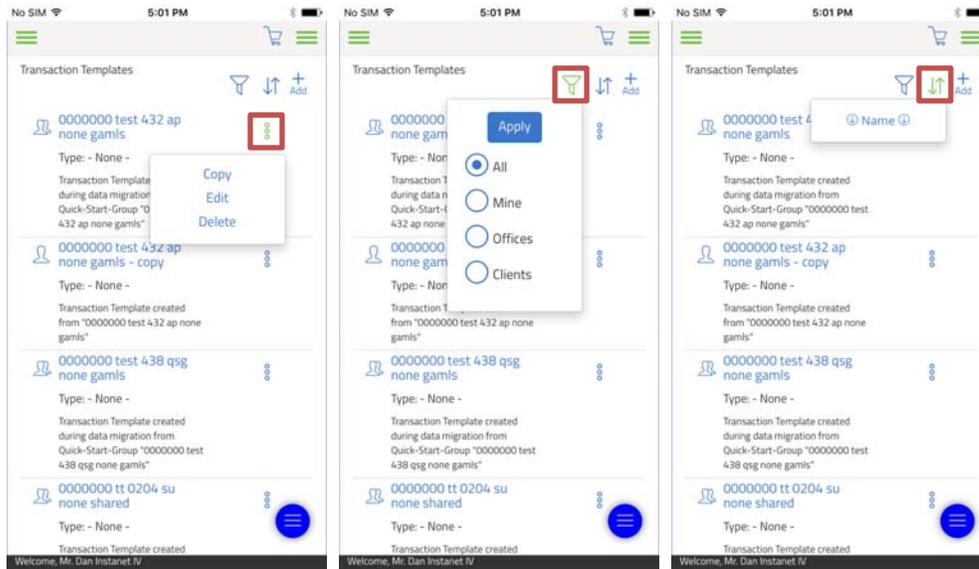
Go ahead and hit the "Add +" icon to create a new template.

- ■ Give it a name in screenshot 2.
- ■ You will land on the third screenshot once you created your template. Tap the arrow next to detail to collapse this section.
- ■ Hit the plus icon next to each section to add and an item and expand it at the same time.


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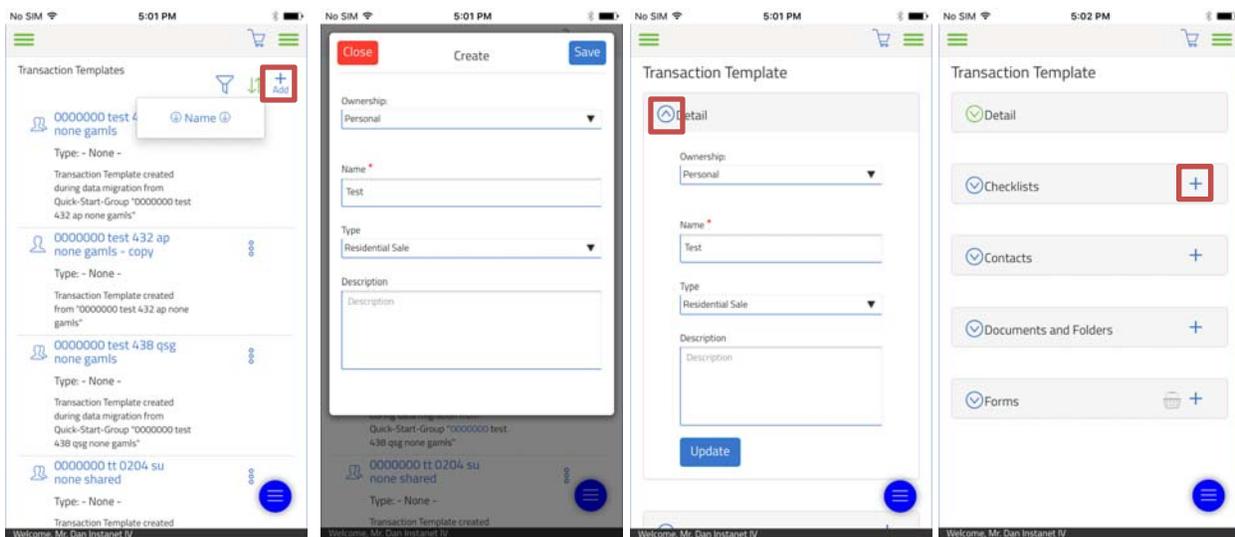
Now we can go ahead and link our checklist to this template by hitting the plus icon next to checklist and checking off the checklist we want to attach it to. (You can link multiple at a time).
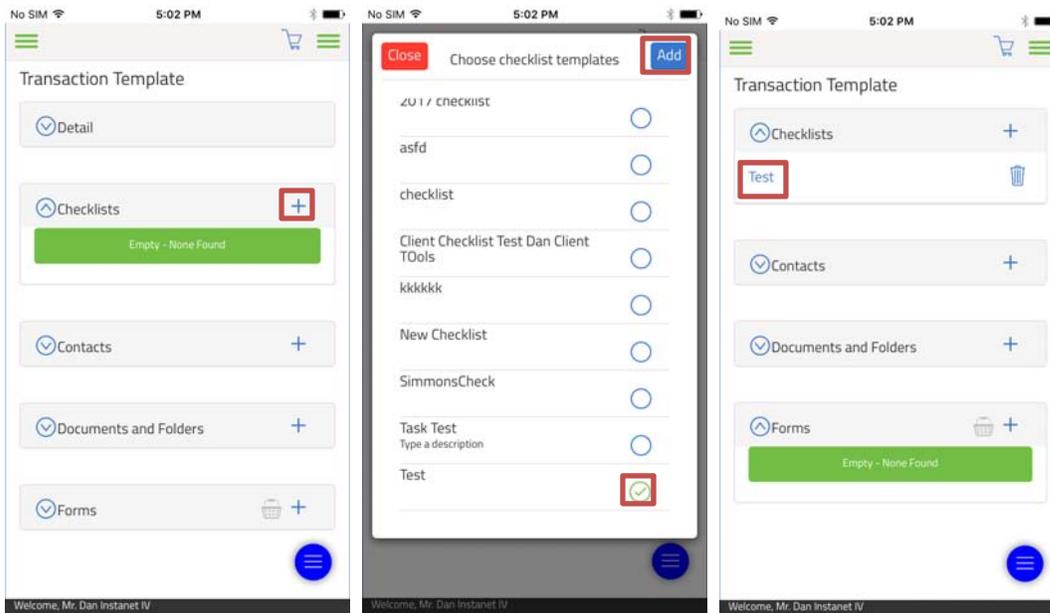
Next I will add forms. Hit the plus icon and choose the forms you want to be part of this template.
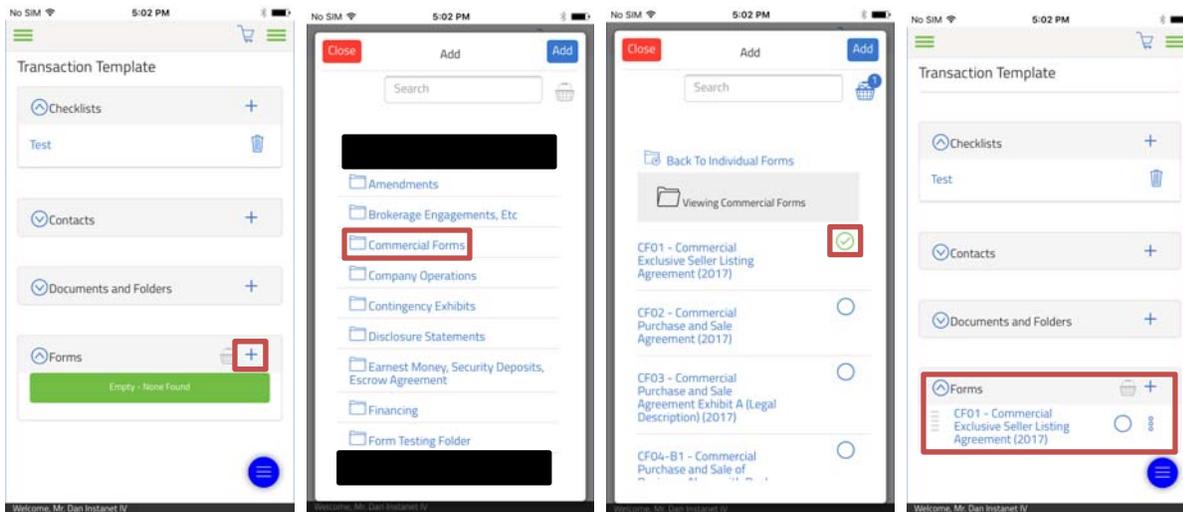
Once you are done you should see something similar to the template below. Now when you create a transaction you will see it in the drop down selection for templates. If you apply it to your transaction it will bring all the information below from the template into the file now.
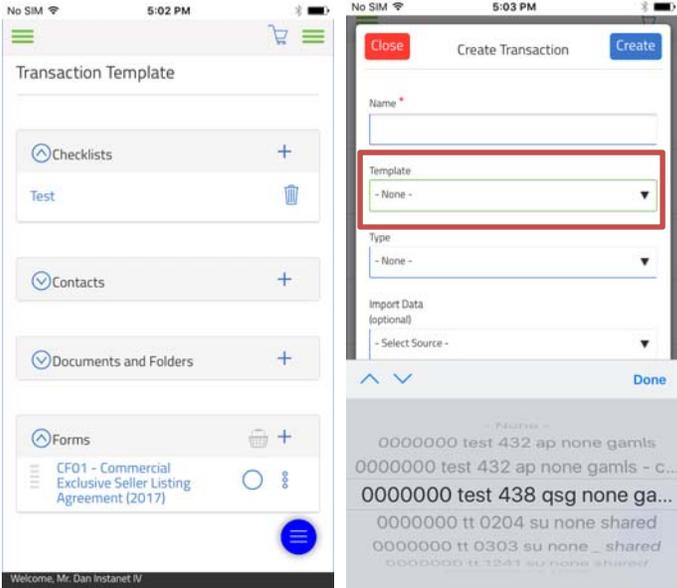
That is it for managing checklists and templates.