

TransactionDESK®

App

May 30th, 2017

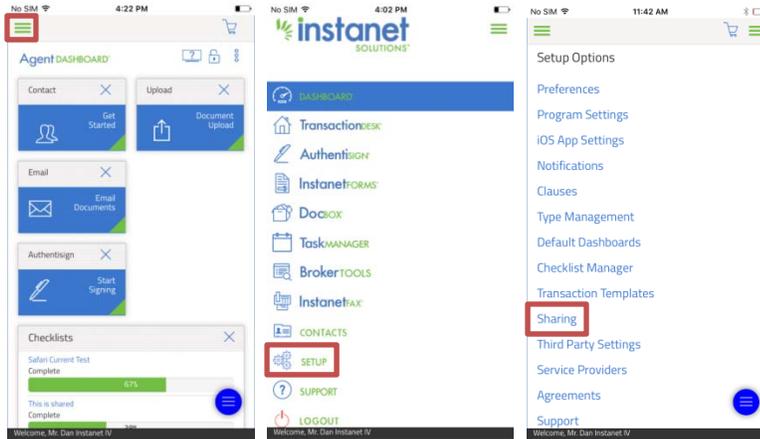
Sharing Transactions and Documents in the App

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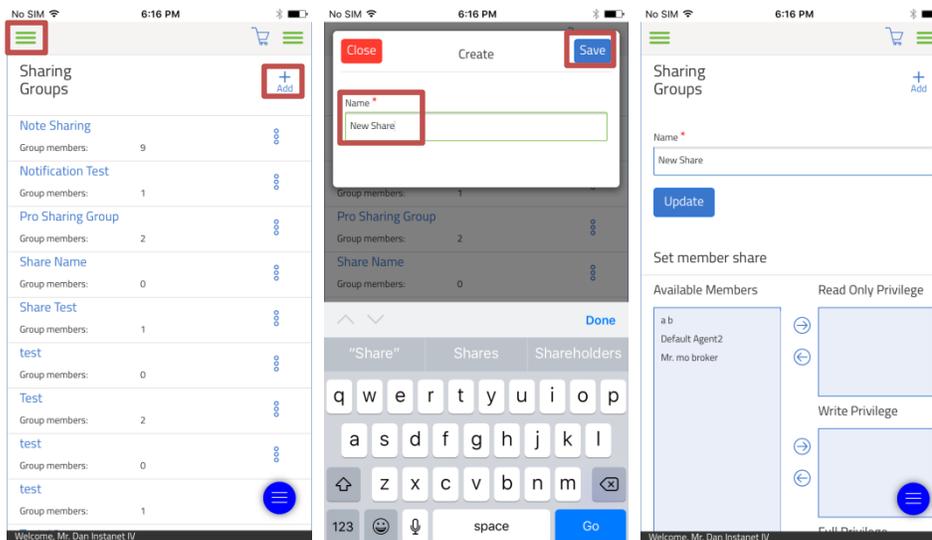
Sharing Transactions and Documents in the App

Below is an overview on how to share a transaction or a document in the TD App. To get started we first need to make sure you have share groups created. Log into the app and hit the hamburger button on the left hand corner and then tap the setup menu option and then sharing.

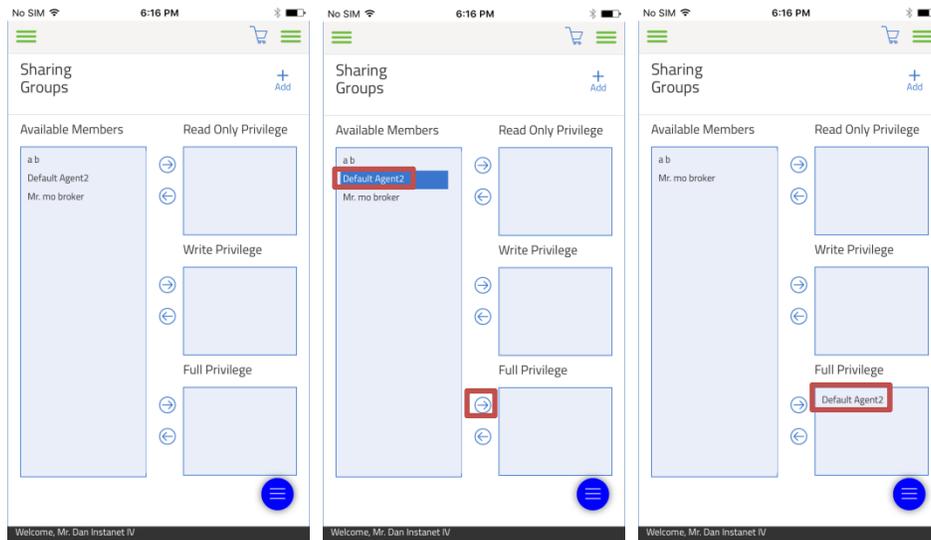


Once you are in the sharing section you can start adding share groups. To get started just hit the “Add +” icon near the top right hand corner to get started.

- Give the share group a name like in screenshot 2 and hit save.
- You will now land on the third screenshot to start assigning different members in your office to various permission levels.

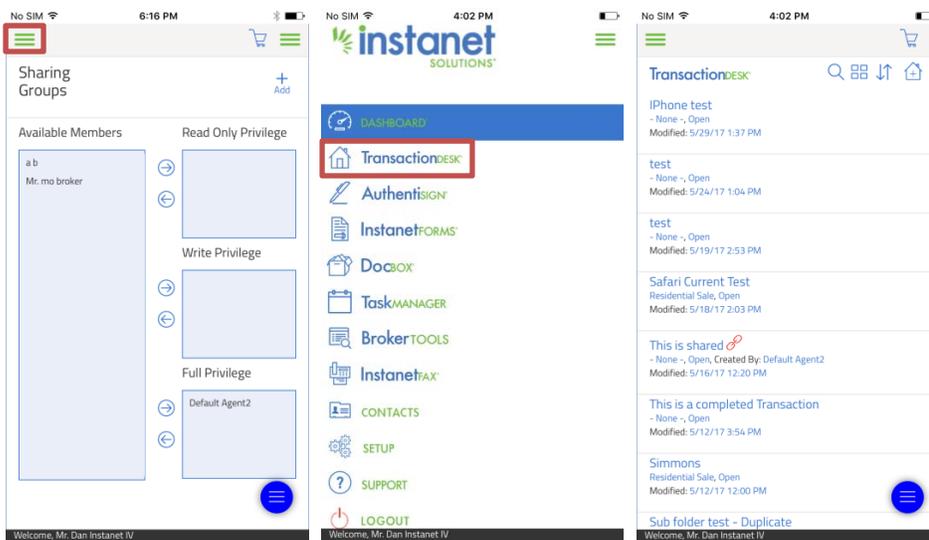


To assign someone to a certain permission level, tap their name once so it is highlighted. Now hit the right pointing arrow next to the permission level box you want to put them in.



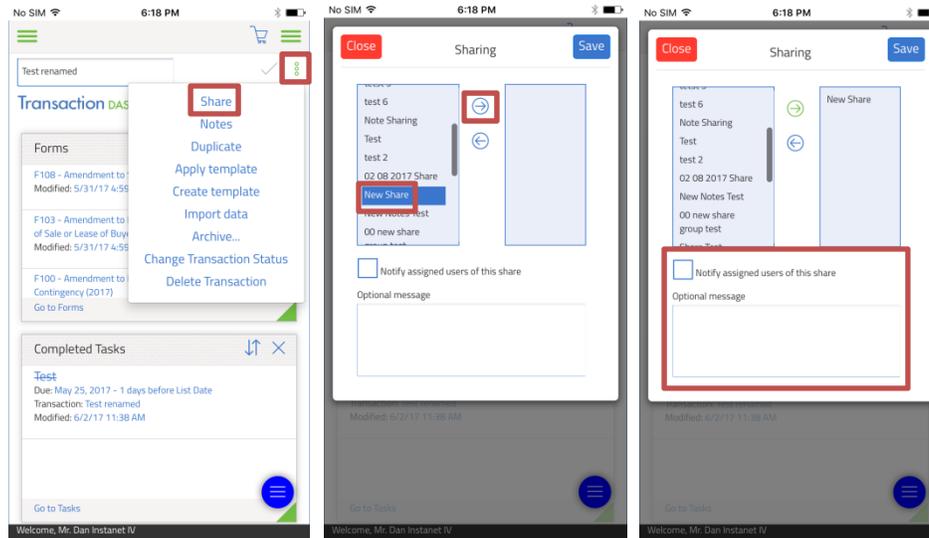
- Read Only will only let the user look at an overview page of your transaction. They will not be able to edit or modify the transaction in any way.
- Write Privilege allows the user to modify the transaction such as forms, property details etc. but they won't be able to delete anything.
- Full privilege lets the user have full control of the transaction including the ability to delete it.
- As you add people the share group automatically saves so don't worry about hitting update at the top.

Now that you have created a share group you can start sharing your transactions or documents with those users. We will start with a transaction. Hit the hamburger button in the top left hand corner and hit the TransactionDesk option. Now tap the name of the transaction you want to share.

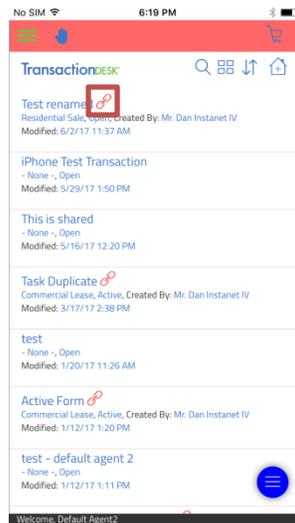


Once you have the transaction open hit the ellipses menu next to the transaction name. (Looks like three horizontal dots).

- Now hit the share option.
- Tap a name of a share group on the left and hit the arrow to put it in the box on the right.
- Once you have done that the transaction will now be shared with that group, you can also use the notification checkbox and optional message to alert those users.

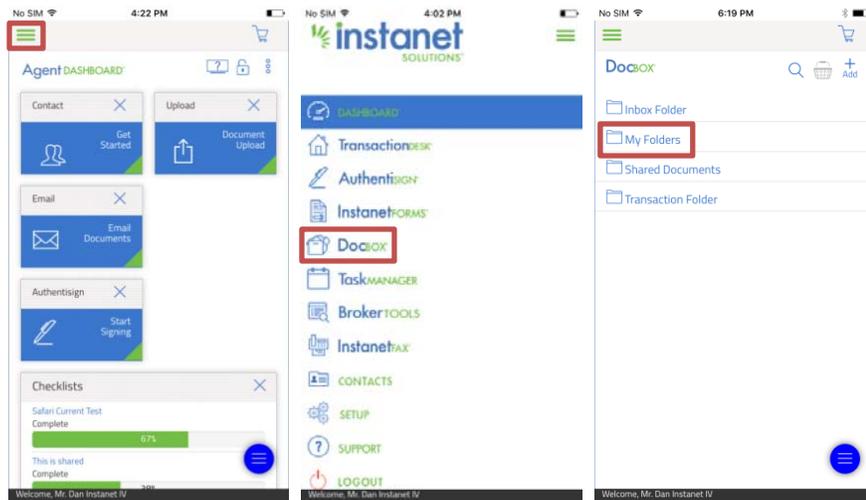


I am impersonating the agent in this screenshot so that is why there is a red bar at the top. But if they login they will also see that shared transaction in their list now. Shared transactions are marked by the red paperclip icon.



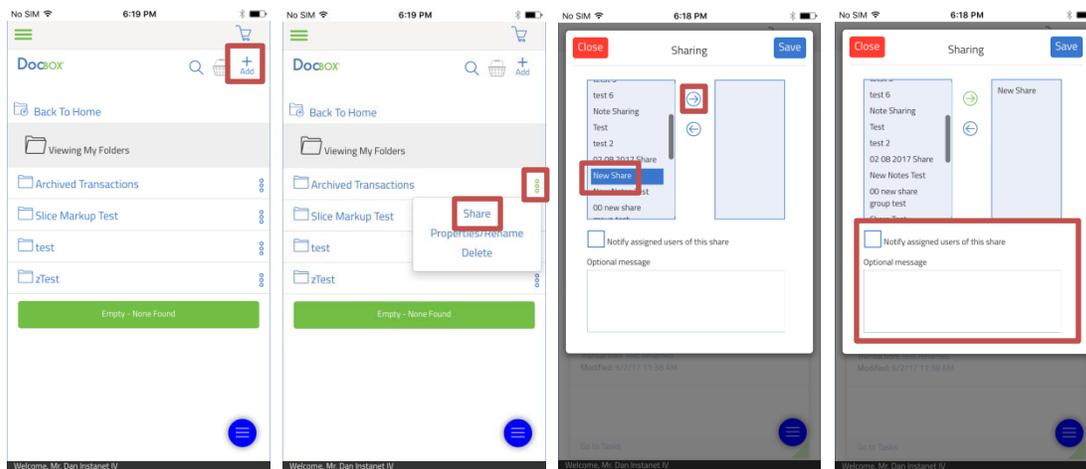
Now that you know how to share Transactions we can look at how to share documents from your DocBox section.

- Hit the hamburger button in the top left hand corner.
- Tap the DocBox section this time.
- Once you are in this page you will land on the third screenshot. Tap “my folders” to enter your sub folder directory so you can share your folders and/or documents.

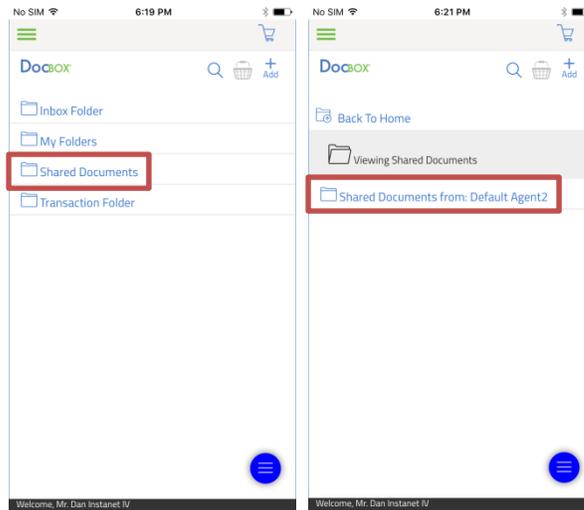


In my example below I have already created a few subfolders and uploaded documents to them. You can create them by hitting the “Add +” icon in the top right hand corner. Once your folder or document is created or uploaded hit the ellipses menu next to it and tap share.

- Tab the name of the share group so it is highlighted and hit the arrow to put it in the box on the right.
- Use the checkbox and optional message if you want to alert those users of the shared items.



Now that you have shared the documents, when users go into their DocBox section and to their shared folders section they will now see your shared folders. Also if they are adding documents anywhere in the system and it display the DocBox symbol they can tap that and upload documents directly from this share group into that location.



That is it for sharing documents and transaction files with other agents in your office.