Broker TOOLS

Releasing Transaction Files and How to Archive a Transaction

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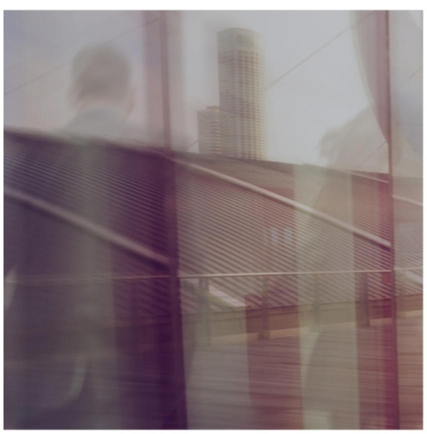


Releasing Transaction Files and How to Archive a Transaction

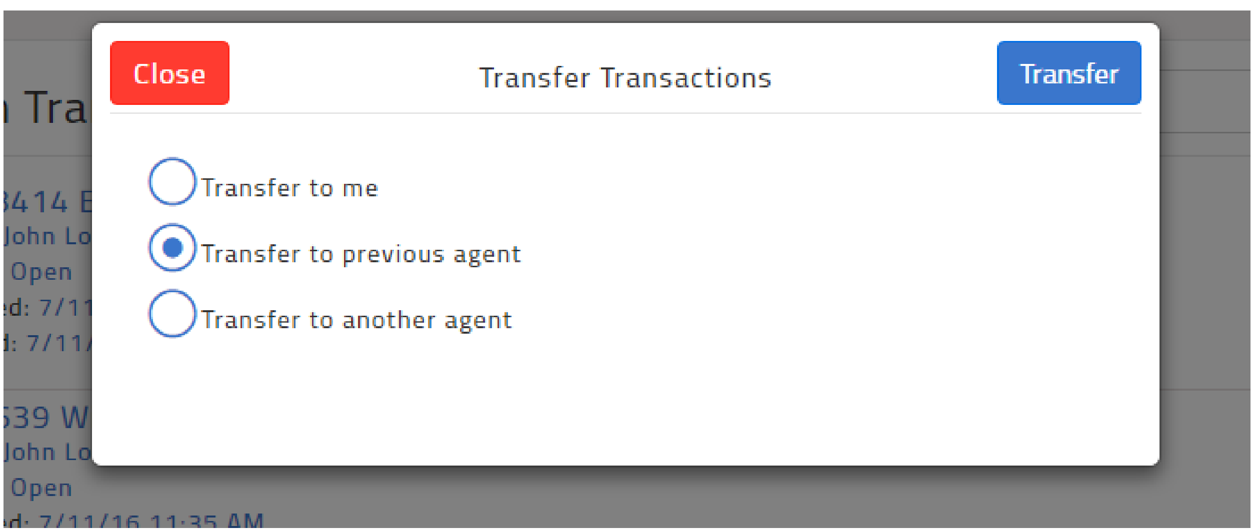
When an agent leaves your office, and your association/MLS has the transaction transfer feature turned on, all of the files that belonged to that agent will be transferred to the super user of the office that they were associated with.

If you do not need to create a PDF of any of the transferred transactions and want to release the transactions back to the agent, send an email request to accounts@instanetsolutions.com authorizing the release of the transaction files back to the previous agent. Alternatively, you can go to Broker Tools>Transaction Transfer, search by agent name and select the transactions to release back.

As a super user you may want to release these files back to the agent but still need to keep a record of them, here is how to do this:

1. Select the  icon from the menu at the left.
2. Select **Transaction Transfer.**
3. Transactions display on this screen when one of your agents moves to another office. This screen allows the super user to either assign the transactions to themselves, to others in the office or release it back to the previous agent.

Select the transaction(s) to transfer back to the agent and select the  icon for additional options.



***If you intend to archive the transactions you do not need to release them to yourself or another agent first. You can simply begin the archiving process. Archiving the transactions creates an interactive PDF of the entire Transaction. It will include all Forms/Documents/Contacts etc. and all Transaction history. To Archive the transactions:

1. Select the icon from the menu at the left.
2. Select **Transaction Transfer.**
3. Select the transaction to Archive to open the transaction.
4. Select the icon at the upper right of the screen.
5. Select **Archive.**
6. Select Generate New Archive. This begins the process of creating a PDF for the transaction and may take some time depending on the amount of data in the transaction.
7. To obtain the archived PDF, select the icon at the upper right of the screen and select Archive.
8. Select the **Download Archive** link and save it to your Desktop.
9. Open the document through Adobe Reader. This will allow you to access any document associated with the transaction by selecting the icon for on the Document Details page.

Now that you have a saved copy on your desktop you can upload to your computer drive, server or back into TransactionDesk into your Docbox .

*****ONCE YOU HAVE FINISHED ARCHIVING**

Once you have finished archiving, you will need to send an email to accounts@instanetsolutions.com stating your name, company, and that you would like to release the transferred files for _________ agent back to that agent, or you can follow along above in the beginning of this guide on how to transfer files back to the previous agent on your own.