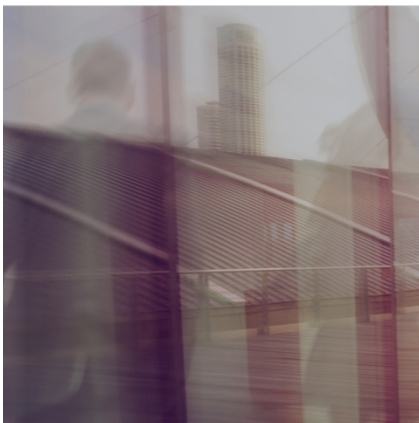# Broker TOOLS

Office Transactions in Broker Tools

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Office Transactions in Broker Tools

The Office Transaction section of TransactionDESK is a great tool for brokers and Admin Super Users who want easily access any transaction in their office. Office Transactions also allows you to transfer transactions to other agents, and change transaction statuses on multiple transactions at once for your agents.

1. Select the ⬚ icon from the menu at the left and select **Office Transactions.**
2. The list of transactions for the agents your office will display. If you are associated to multiple offices, select the specific office to display from the drop down at the upper right.
3. Filter/Sort the data using any of the icons below:

   ▽ Filter by Transaction Type and/or Status.

   ⇅ Sort by Name, Transaction Type, Date Created, Last Modified, Closing Date, Listing Date, Listing Expiration Date.
4. You can open any transaction and access the Transaction Dashboard by selecting the name of the Transaction.

Transfer a Transaction to another Agent

1. To Transfer a transaction to another agent, select the transaction(s) using the ◯ selection icon to the right of the transaction.

2. Select the 🧺 icon at the upper right.
3. If there are any transactions that were selected which you want to remove from the transfer, select the

   ⊖ icon to the right of the transaction to remove it.

4. Select the ⇄ icon to begin the transfer process.
5. Select the appropriate option:
   - Transfer to me.
   - Transfer to another Agent. This option will allow you to select the office and agent to Transfer the selected transaction(s) to.

6. Select **Transfer** to finalize the process.

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