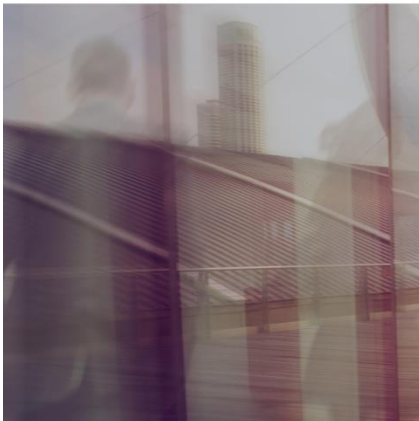# Transaction DESK®

Sharing Transactions and Documents in the App

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Creating Share Groups: Before Transactions or Documents can be shared, Share Groups must first be created:

1. From the main menu select the ⚙ icon.
2. Select **Sharing.**
3. Select **+Add.**
4. Give the share group a name and **Save**.
5. Select the member(s) that will be part of the share group and move them to the appropriate privilege box:

> **Read Only**: No editing or deleting
> **Write Privilege**: Allows editing but cannot delete
> **Full privilege:** allows full control of the transaction including the ability to delete it

This screen saves automatically.

Sharing a Transaction

1. Select the 🏠 icon from the main menu.
2. Select the Transaction to be shared.
3. Select the ⋮ icon at the upper right of the Transaction Dashboard.
4. Select **Share.**
5. Select the Share group on the left and move it to the selected box using the directional arrow.
6. To send a notification to members of the group alerting them of the share, select the Notify box at the bottom of the screen.

Sharing Documents

6. Select the 📁 icon from the main menu.
7. Select **My Folders.**
8. Select the **+Add** icon at the upper right.
9. Select **Add New Folder** and create subfolders to house the documents you would like to share.
10. Select your subfolder, select the **+Add** icon and choose **Add New Document** to populate the folder with the documents to be shared.
11. From the list of folders, select the ⋮ icon to the right of the folder.
12. Select **Share.**
13. Select the group(s) to share the folder with and move them to the selected box on the right using the directional arrow. You may notify the group of the share by selecting the **Notify** box at the bottom of the screen. Select **Save**.
14. Within the folder select the ⋮ icon to the right of the document you want to share and select **Share** .

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15. Select the group(s) to share the document with and move them to the selected box on the right using the directional arrow. You may notify the group of the share by selecting the **Notify** box at the bottom of the screen. Select **Save**.

When users in the Share Group access their DocBox and go to their shared folders section, they will now see your shared folders. In addition, if they are adding documents anywhere in the system and the DocBox icon displays, they can select that icon and upload documents directly from this Share Group into that location.