

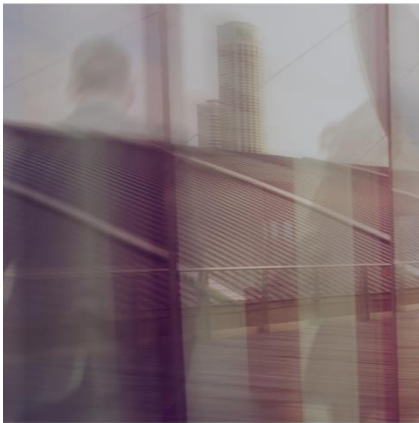
TransactionDESK®

Creating Transaction Templates



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Creating Transaction Templates

Transaction Templates can be selected during the creation of a transaction or applied after the transaction has been created. Transaction Templates auto-apply forms, documents, checklist items etc., to a transaction.



Creating a New Transaction Template

1. Select  from the left menu
2. Select **Transaction Templates**
3. Select the **+Add** icon at the upper right
4. Enter a **Name** for this Transaction Template (Example: Residential Listing, Internal Closing Package, etc.)
5. Select a Transaction **Type** or choose "None".
6. Enter a **Description** (optional)

7. Select 

8. The Transaction Template screen has several sections:

Details: Update the Name, Type or Description entered in steps 4, 5 & 6

Checklist: Select  to display the screen of available Checklists to the Template. Select the appropriate checklist(s) and select 

Contacts: Select  to:

- **Create a New Contact** – adds a fixed contact that would be a part of every transaction when this template is selected
- **Create an Empty Contact** – creates an empty contact record for the specific contact type selected. The agent would then fill in this record according to the specific transaction details (eg. Buyer, Seller, Lawyer)
- **Add an Existing Contact** – adds a fixed contact selected from your Contact database

Documents and Folders: Select  to:

- Add Folder – Create folders for document uploads (example: Photos, Communications)
- Add Document – Upload any documents that the agent might need for the transaction (Note: this does not include any fillable forms from your forms library. They will be added in the next step)



Upload from your computer drive






Copy from DocBOX




Import from Cloud (Dropbox, Google Drive, OneDrive, box)


Forms: Select  to:

- View available forms library folders. Select appropriate folder
- Use to locate documents in the library
- Select documents by clicking into the selection indicator . You may select multiple documents.
- Select  to view all of your selections. Remove any unwanted documents by selecting . Select **Close** when done.
- Select **Add** to place the forms on the template.
- If you need to edit any of the forms with data that will carry through to all transactions using the template, you can do so at this time (example: a clause that is consistent and always placed on the form or a dollar or percentage value that never changes).

Select the form, free form type into any of the fields or use the following tools:


 **File** Add Confidential Watermark or Exit back to the previous screen

 **Fonts** Edit Font styles, sizes and colours



 **Clause** Add pre-created Clauses to multi row fields

Applying a Template to a Transaction

Option 1: During the Transaction creation process

1. Select  from the menu at the left
2. Select +Add
3. Enter the Transaction Name and select a template from the Template dropdown.
4. Proceed with entering the transaction

Option 2: After the Transaction has been created

1. Select  from the menu at the left
2. Search for and select the Transaction
3. From the  icon at the upper right, select **Apply Template**
4. Select the appropriate Template from the dropdown
5. Select **Apply**