

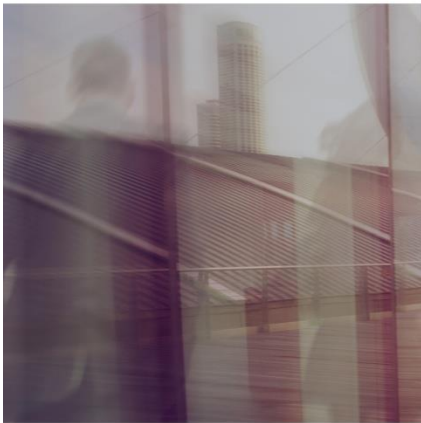
# TransactionDESK®

Agent Guide to Creating Checklists



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
## Agent Guide to Creating Checklists

Transaction Checklists contain actions and documents required for a transaction. Once created, a checklist can be manually applied to a transaction (see last page of this guide) or automatically applied to a transaction via a Transaction Template when a template has been selected during the Create Transaction phase (see guide on "How to Create Transaction Templates").


There likely will be Checklists and Templates already in the system that were pre-created by your administration but you are also able to create and manage your own personal checklists.

### Creating a Checklist

1. Log in to TransactionDesk and select the  icon from the left menu.
2. Select **Checklist Manager** from the Setup Options menu.
3. Select **+Add** to create a new checklist.
4. Select the **Ownership** option for this Checklist:
  - **Personal** (default): Available only to the creator of the list
5. Enter a Name for the Checklist and select .
6. Select **+Add** to add a new checklist item.
7. On the **General Tab** of the screen, select/enter the following:
  - **Document**: Select if this checklist items requires the upload of a document/form (note: if you want set due dates for the document, you must also select Task).
  - **Task**: Select if this checklist item is an action item to be completed.
  - **Mandatory**: Select if the checklist item is a Mandatory requirement (Agents that add a mandatory item into their transaction cannot delete it).
  - **Name**: Enter a Name for this checklist item; this is just general info about the checklist item.
8. The **Access Tab** is used when the Client Dashboard has been activated for a Contact and the transaction is being shared with that contact. To give access to the checklist for a Contact you have activated the Client Dashboard for:
  - Select **Yes** under **Limit Access**.
  - Select the **Contact Type** and select  . You can add additional Contact Types by repeating this action.
9. The **Review** tab allows you to activate the Review process and select the Reviewer who will see the item in their review documents screen. You may select either **Staff Review** or **Broker Review**, or you may select both.
10. The **Task Tab** allows you to set a Due Date for the checklist item and to trigger Reminder notifications to the agent.
11. The **Assign Tab** is used in conjunction with the Access tab for assigning the task to a Contact where the Client Dashboard has been activated for the transaction.
  - Select **Yes** under **Add Default Assignees**.

- Select the **Contact Type** and select  . You can add additional Contact Types by repeating this action.
  - Activate **Notifications**:
    - **Notify assigned members via email?** - sends a notification to the Contact alerting them of the task.
    - **Notify owner on status change?** – notifies the agent when the Contact has changed the status of the checklist item.
12. Select  when you have fully configured the Checklist item.
13. Repeat the process to add additional Checklist Items to the Checklist.

### Editing/Deleting/Copying an Existing Checklist

1. Log in to TransactionDesk and select the  icon from the left menu.
2. Select **Checklist Manager** from the Setup Options menu
3. The list of current Checklists will display. Use the following options to assist you in searching and finding a checklist:




Filter the list by All, Mine, Office or Clients.







Sort ascending/descending.



### Delete/Copy a checklist

- Locate the Checklist in the list and select the  icon. This will present you with the **Copy** or **Delete** functions. **Note:** Delete option will only be available for personal checklists.

### Edit/Delete/Add a Checklist item (Personal Checklists only)

- Locate the Checklist in the list and select the  icon. Select the **View** option. Ability to Edit.
- Remove an item from a checklist item by select the  icon to the right of the checklist item and selecting **Delete**.
- Edit a Checklist Item by selecting the  to the right of the checklist item and select **Edit**. This will allow you to make changes to the General, Access, Review, Task and Assign Tabs. Select  when done.
- Select **+Add** to add a new checklist item to the checklist.

### Manually adding a Checklist to an existing Transaction

1. Select the  icon from the left menu.
2. Select the Transaction from the list.
3. Select Checklist from the right menu.
4. Select the **+Add** icon at the upper right.
5. Select **Add Checklist**.
6. Select the Checklist(s) to apply and select .

\*\*New Checklist items can also be added to the transaction by selecting **Add Checklist Item** in Step 5 above