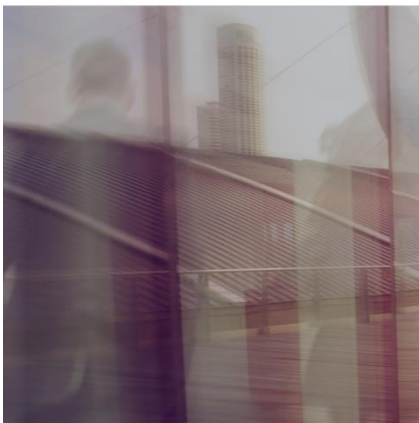# Transaction DESK®

How to Create a Transaction and Import Data

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lwolf.com
1.866.CRY.WOLF(279.9653)

How to Create a Transaction and Import Data

1. Log in to TransactionDesk and select the icon from the menu. Select the **+Add** icon at the right. (You can also start a transaction by selecting the Create Transaction widget on your home page).
2. Give the transaction a name.
3. Apply a template if the transaction requires (Templates will automatically assign certain contact types, forms and documents to the transaction).
4. Select the transaction type (e.g. Residential Listing, Residential Sale, etc.).
5. Select the data source for property data import (options available will vary by client):
   - MLS Listing Data (by listing number).
   - Tax Data Source (by Tax ID).
6. Add yourself as the selling agent, listing agent, or neither or both. This automatically creates a contact record for you based on your selection.
7. Select to Use Wizard (recommended). This initiates the 5-step process to setting up a transaction. If you do not use the wizard, you will be directed to the Transaction Dashboard for your transaction.
8. Select **Create**.

Transaction Wizard Step 1: DETAILS

1. Enter the property Details (address, price, property type, etc.). If you used the import feature as outlined in #5 above some of the information will pre-populate for you. You are encouraged to enter as much detail as possible on this screen as this information will be used to populate the forms for this transaction.

2. Select **Next** when complete to move to the next step of the Wizard or select ✓ at the upper right or **Save and exit** at the bottom center to save information if you are exiting the wizard.

Transaction Wizard Step 2: DATES

1. Enter the transaction dates (list date, offer date, close date, etc.).

2. Select **Next** when complete to move to the next step of the Wizard or select ✓ at the upper right or **Save and exit** at the bottom center to save information if you are exiting the wizard.

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Transaction Wizard Step 3: CONTACTS

1. Edit any existing Contact Records:
   - Select the contact record.
   - Edit the Contact information on the General and/or Address tabs.
   - Select **Save**.
2. Add new Contact Records:
   - Select the **+Add** icon at the upper right.
   - Select option:
     - ○ Create New Transaction Contact (add the Contact information on the General and/or Address tabs).
     - ○ Add Existing Contact (from your saved contact database within TransactionDesk).
     - ○ Add Yourself.
     - ○ Add Contact from Google Contacts or Apple Contacts.
3. Select **Next** when complete to move to the next step of the Wizard or select ✓ at the upper right or **Save and exit** at the bottom center to save information if you are exiting the wizard.

Transaction Wizard Step 4: FORMS

The Forms section allows you to add the fillable forms for TransactionDesk.

1. Add forms:
   - To add a form select the **+Add** icon at the upper right.
   - Select the folder where your form resides.
   - Select the form(s) you would like to add by selecting the ○ icon to the right of the form. Use the **Search** tool to assist you in finding your forms.
   - Select the 🧺 icon to view your selections. Remove any selection by selecting the ⊖ icon beside the form to be removed. Select **Close**, and then choose **Add** to add the form(s) to your transaction.
   - Step 4 is where you add whatever forms you want to attach to this transaction. Just hit the Add New button at the top and select the forms you need.

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2. Edit Forms

- Select the Form to open the editing tool.
- Click into any open text field area to edit the text.
- Use the options under ☐ File ▾ to add watermarks, print, send by email or fax, save as PDF.
- Use the options under **AA** Fonts ▾ to change Font styles, colours and sizes.
- Select multi-row areas of the form and access the pre-created Clause library by selecting ✏ Clause .
- Select the Exit icon under the ☐ File ▾ to exit the editing screen.

Transaction Wizard Step 5: DOCUMENTS

The Documents section allows you to attach any miscellaneous documentation to the transaction (client communications, images, feature sheets, acceptance letters, maps, etc.) To add Documents:

1. Select the +Add icon at the upper right.
2. Use one of the following to upload a document:

   ⬆ Upload Documents from your computer.

   📦 Copy Document from DocBOX.

   ☁ Import from a Third Party (Dropbox, Google Drive, OneDrive, and box).

   ✉ Email Upload (access an email address unique to your transaction. Use this address to email documents directly to the Documents section of the transaction.

3. Document Options: The options available by selecting ⋮ icon will allow you to do the following:
   - **Preview** the Document.
   - **Print** the Document.
   - View **Properties/Rename** the Document.
   - **Send** the Document by Email or Fax.
   - **Copy/Move** the Document to a checklist item, another folder, another transaction, to the cloud.
   - **Slice/Markup** the Document.
   - **Sign in Authentisign.**
   - **Revisions** to view previous versions.
   - **Notes** - Add or review the notes entered for the Document during approval process.

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- **History** – Review the Action details of the Document.
- **Certify and Digitally Sign.**

4. Select [Done] to complete the setup of the Transaction.

Transaction Dashboard

Once a transaction is completed via the Wizard, the screen will display the Transaction Dashboard. At the right of the dashboard is the Transaction Menu. The menu allows you to access all of the areas that were completed as part of the Wizard for future editing (note: Dates will be located at the bottom of the Details page).

The dashboard can be configured with various widgets for easy access and at a glance display of frequently accessed features/information. Changes to the Transaction Dashboard will pull through to all of your transactions. To edit the Transaction Dashboard:

1. Select the ⋮ icon beside the Lock icon at the upper right to display the widget menu
2. The widget menu will display:
    - Blue Widgets – Action Items
    - Green Widgets – Lists of Information
    - Grey Widgets – Already plotted to the dashboard
3. Drag and drop the Widget onto the Dashboard. Once plotted drag it to your preferred position on the page

4. Lock your changes in place by selecting the 🔓 icon.

Accessing Transactions Once Created

Access your transactions once created from the Transaction Widget on the Agent Dashboard:
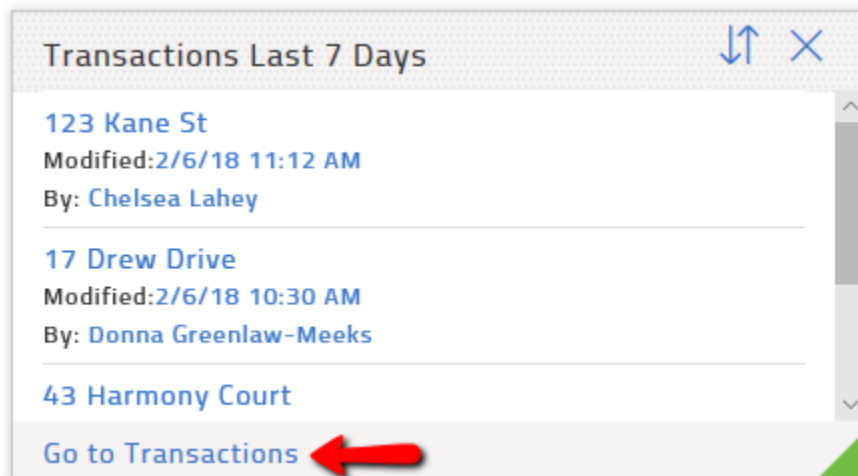
Or alternatively, by selecting the 🏠 icon from the left menu.