

Setting up TransactionDesk Templates

Transaction templates define a custom set of forms, contacts, documents, and checklist items that are included in your transactions by default. You can also add standard text to your forms that pre-populates starting a transaction you're your template.

For example, you might create a template called "Residential Listings" and include the forms and documents specific to that type of transaction. Each time you have a new listing, you can use this template to automatically add your pre-defined materials to the transaction.

Create a New Transaction Template

From your Agent Dashboard, click on the "Templates" icon in your sidebar.



From here, you have two options:

- Copy and Modify an Existing Transaction Template (from GRAR, your broker, etc.)
- Create a Template from Scratch

Copy and Modify an Existing Transaction Template

This option allows you to start with an existing template, and add or remove materials as needed. Most likely, you'll need to make a copy of the template to edit it. On your Transaction Templates screen, click the three dots to the right of your template. Click "Copy" to duplicate it.





On the pop-up window, name your template and click the blue "Create" button.

Close	Сору	Create
Name *	GRAR Purchase Packet Rev. 4/8/24 - copy	

Modify your transaction template by clicking the three dots at right, and selecting "Edit."

0	Transa	ction Templates	bha tì
		GRAR Listing Packet Rev. 04/03/2024 Type: Residential Listing Created By: Greater Rochester Association of REALTORS GRAR Listing Packet	8
		GRAR Purchase Packet Rev. 4/8/24 Type: Residential Sale Created By: Greater Rochester Association of REALTORS GRAR Purchase Packet Rev. 4/8/24	Copy Edit Co Delete
	L	My Listing Packet Type: Residential Sale Template from "GRAR Purchase Packet Rev. 4/8/24" + individual forms	8
13			

From here, you can add or remove forms and documents, add default transaction contacts, and share your template. See the rest of this guide for specific instructions to customize your template:

- Add a New Form to a Template
- Remove a Form from a Template
- Add Pre-Filled Text to a Form in your Template
- Include Default Contacts in your Template

Create a Template from Scratch

In the top right corner, click the "+" symbol. Name your new template; you can also select the type and add a description.

Close	Create	Save
Name *	My New Template	
Туре	Residential Sale	▼
Description	Description	



Add a New Form to a Template

Open the "Forms" drop-down section in your template. Click the "+" symbol at top right to add forms.

	Transaction Template		
2	Forms	Add forms	+
	Disclosure RE Agency Disclosure Buyer & Seller NYS (Buyer Side) (11/15)	0	000
	All Parties Agreement - FHA/VA (04/99)	0	000
E	Purchase and Sale Contract for Residential Property (Rev. 03/2024)	0	000
	Purchase and Sale Contract for Residence in a Homeowner's Association (HOA) or is a Condominium (Rev. 03/2024)	0	000

Search for the form you need, and select the appropriate version for your board/MLS. It will be added to your basket icon. Click the blue "Add" button at top right to insert the form into your template.

You should now see this form listed in "Forms" section of your template.

Close	Add forms to transaction	Add
	Property Condition	
Libra	ry forms matching "Property Condition"	
	Property Condition Disclosure – Residential NYS - Templated for AuthentiSign (Rev. 03/2024) All Usting Related	\bigcirc
A	Property Condition Disclosure FAQs (03/24) All Listing Related	0
	Property Condition Disclosure – Residential NYS - Templated for AuthentiSign (Rev. 03/2024) Other - Chautauqua-Cattaraugus MLS Forms	\oslash



Remove a Form from a Template

When a form in the library becomes obsolete, you will see the red error message "This form has been disabled." This means that it should no longer be used, and you will need to update your template with the new version.

Transaction Template		
	\checkmark	v
Disclosure RE Agency Disclosure Buyer & Seller NYS (Seller Side) (11/15)	0	000
CHANGE FORM - UNYREIS - MLS Change Form (Rev 06/19)	0	000
Lead Compliance Addendum to Purchase & Sale for Residential Housing (Rev. 09/2020) ▲ This form has been disabled.	0	000
Seller's Notice of Removal of Contingencies (06/19)	0	000
Seller's Notice to Buyer to Remove Sale and Transfer of Title Contingency (Bump Notice) (09/15)	0	000

Remove this form by clicking the three dots and choose "Delete."

0 6	Transaction Template	
	Forms	+
	Disclosure RE Agency Disclosure Buyer & Seller NYS (Buyer Side) (11/15)	Menu
	All Parties Agreement - FHA/VA (04/99)	Preview Download
	Purchase and Sale Contract for Residential Property (Rev. 03/2024)	Delete Add mandatory lock
3D	Purchase and Sale Contract for Residence in a Homeowner's Association (HOA) or is a Condominium (Rev. 03/2024)	Send To New Authentisign

Note that templates based on your board's or broker's templates DO NOT update automatically—you will need to manually remove old forms and add in the new versions. You will also need to re-insert any pre-filled text on your template forms.



Add Pre-Filled Text to a Form in your Template

When you add pre-filled text in your template, it will automatically be inserted into any transaction forms created from that template.

To add pre-filled text to your template forms, first choose the template that you want to edit.



Scroll to the "Forms" section and find the specific form that you want to modify. Click the three dots at far right and choose "Edit form."

	Transaction Template	
Z	Forms	-
	Disclosure RE Agency Disclosure Buyer & Seller NYS (Buyer Side) (11/15)	Menu
	All Parties Agreement - FHA/VA (04/99)	Preview Download
E	Purchase and Sale Contract for Residential Property (Rev. 03/2024)	Delete Add mandatory lock
100	Purchase and Sale Contract for Residence in a Homeowner's Association (HOA) or is a Condominium (Rev. 03/2024)	Send To New Authentisign

Enter your default pre-filled text into the form. Note that although this text will automatically be included in transactions created from this template, you can modify or delete it while you're working on the transaction.

When you're finished, click the "X" to Save/Exit.

⇒ ∩	TransactionDesk		AA		Alt	Ð	8	Save/Exit 😣
2	Listing Broker:	ABC Realt	у		Selling E	Broker:		
企	NY License No.:	98765432	1	_	NY Licer	se No.:		
2	Address:	123 Main St			Address:			
	Rochester	NY_Zip:	14623					Zip:
	Phone:	Fax:			Phone:			Fax:
1	Listing Agent:	David Realt	or		Selling A	gent:		
E	NY License No.:	12345678	9		NY Licer	se No.:		
	6							



Include Default Contacts in your Template

Use this feature to add default contacts that will be auto-filled into transactions created from your template. This could be your broker/team lead, real estate attorney, escrow company, etc.

First, choose the template that you want to edit.



Scroll to the "Contacts" section and click the "+" sign to add a contact. You have three options:

- Create a new contact from scratch: Enter the contact's information to add them to your address book
- Create empty contact: Creates a placeholder contact based on their role in the transaction
- Add existing contact: Inserts a contact already saved in your TransactionDesk platform

00	Transaction Template	
	⊗ Detail	
Ð	Checklists	Create new contact Create empty contact
		Add existing contact
E	Contacts	Add Contact
	David Realtor Listing Agent	Ŵ
(B)		

To add an existing contact, search for their name. Check the circle at right, and click the blue "Add" button to include them in your transaction template.

Close	Add existing contact	Add
	david 🕎	↓↑ ?
David Realtor drealtor@gmail.com Agent		\oslash



In the pop-up window, select the contact's role from the drop-down list. This ensures that their info will auto-fill in the correct place on your forms. When you're finished, click the blue "Save" button at top right.

lose	Create Transaction Contact	Sav
General Iden	tifiers Address	?
Туре *	Listing Agent	•
Contact		
First Name *	David	
Middle Name		
Last Name *	Realtor	
Email	drealtor@gmail.com	
Legal Name		
Preferred Signature		
Preferred Initials		
Company	ABC Real Estate	

To create a new contact, first select their role at the top. Then enter their info into each tab of the pop-up window. When you're finished, click the blue "Save" button at top right.

lose	Create Transaction Contact	Sav
General Add	iress	?
Type *	General	•
Contact		
First Name *	David	
Middle Name		
Last Name *	Realtor	
Email	drealtor@gmail.com	
Legal Name		
Preferred Signature		
Preferred Initials		
Company	ABC Real Estate	



Share your Template with your Team or Office

To create transaction templates for an office, you must have a Super User access level and dTransactionDesk Edition for brokers. Other users can share transaction templates with team members or custom groups in the "Sharing" section.

First, choose the template that you want to edit.



Scroll down to the "Teams/Sharing" section. Click the "+" sign at far right to share your template.

3	Transaction Template		
	Ocuments and Folders		+
	⊗Forms		-+
	Teams/Sharing		Add Share Group +
		Empty - None Found	

Share with a New Group or Team

If you have no existing teams or share groups, TransactionDesk will prompt you to create one. Click "go here to create teams/shares."

Close	Teams/Sharing	Save
	You have not setup any teams/shares Go here to create teams/shares	



Then, name your team. In the left column, you'll see the available people on your team that you can share templates with. Search for a member, check the box next to their name, click blue "Add Members" button at the bottom of the screen.

In the right column, set the permissions that you want each team member to have. When finished, click the blue "Save Settings" button at the top right.

00	Teams/Sharing		√Save Settings
	Team/Share Name* My Team Automatically Share Transactions		
	Set Team/Share Members Available Team/Share Members	Selected Team/Share Membe	rs
	Sweetland, Jane	Sweetland, Jane Transaction Permissions Full Read Write	Remove Member
		Full	

Now that you have a team established, return to your transaction template to add sharing permissions. Click the "+" sign to add sharing for the group you just created.

0	Transaction Template	
	Ocuments and Folders	+
 C C<	⊘Forms	
	Teams/Sharing	Add Share Group +
	Empty	- None Found

Find the group name that you want to share your template with. Click the "Add" arrow, and you'll see the name jump to right column. Click blue "Save" button at top right.

Close	Teams/Sharing	Save
My Team	Add 🌖	



Now you should see your group's name in the template under "Teams/Sharing."

> 3	Transaction Template	
	Teams/Sharing	+
Ð	My Team	Û
r and a second s		9

Share with an Existing Group or Team

If you already have a group or team set up in TransactionDesk, select the group name and click the "Add" arrow. You'll see the name jump to right column. Click blue "Save" button at the top right.



To add a new member to your existing team or share group, go into your TransactionDesk settings and choose "Teams/Sharing."





To edit a group, click the three dots at right and choose "Edit."

3	Team/Share Groups	+ Add
	My Team Group members: 1	Menu
		Edit Delete

In the left column, you'll see the available people on your team that you can share templates with. Search for a member, check the box next to their name, click blue "Add Members" button at the bottom of the screen.

In the right column, set the permissions that you want each team member to have. When finished, click the blue "Save Settings" button at the top right.

00	Teams/Sharing			✓Save Settings
	Team/Share Name*	My Team		
	Set Team/Share Membe	rs embers	Selected Team/Share Mem	bers Remove Member
	Sweetland, Jane	Select All	Transaction Permissions Full Read Write	
			Full	

Now you'll see the new member under your team/share name.



Add Documents or Folders to your Template

You can add default folders to a transaction template, and/or include documents from a variety of sources. First, choose the template that you want to edit.

Transa	action Templates	∀ ↓ + Add	
	GRAR Listing Packet Rev. 04/03/2024 Type: Residential Listing Created By: Greater Rochester Association of REALTORS GRAR Listing Packet	000	
•	GRAR Purchase Packet Rev. 4/8/24 Type: Residential Sale Created By: Greater Rochester Association of REALTORS GRAR Purchase Packet Rev. 4/8/24	Copy Edit ← Delete	
R	My Listing Packet Type: Residential Sale Template from "GRAR Purchase Packet Rev. 4/8/24" + individual forms	ŝ	

Scroll down to the "Documents and Folders" section. Click the "+" sign at far right and select "Add folder" or "Add document."

	Transaction Template	
	⊙ Detail	
	⊗ Checklists	+
E	⊘Contacts	+ Add folder Add document
	ODcuments and Folders	Add folder/document
	Empty - None F	ound

Choosing "Add folder" will prompt you to enter a folder name. Click the blue "Save" button at top right.

Close	Create New	Save
Folder Name *	New Folder	

Now you'll see the folder in your transaction template under the "Documents and Folders" section.

0	Transaction Template		
	Ocuments and Folders	+	
	New Folder	° °	



Choosing "Add document" allows you to import documents from several sources:

- **Upload from device/computer**: Browse the files on your computer, or drag and drop to upload
- Copy from DocBox: Include documents from other folders and files in your TransactionDesk account
- Import from third-party: Import files from your third-party cloud storage accounts
- **Email upload**: Send a file via email to the transaction's document files
- **Download contact card**: Save the transaction's custom email address to your contacts

Close	Create New	Save	
You can upload	up to 20 files at once.		
	Drag & Drop files here or click to upload		

For each of these options, follow the pop-up window prompts to add documents to your template. Keep in mind that these files will automatically be included in any transaction created from this template. You'll be able to delete them while editing your transaction.