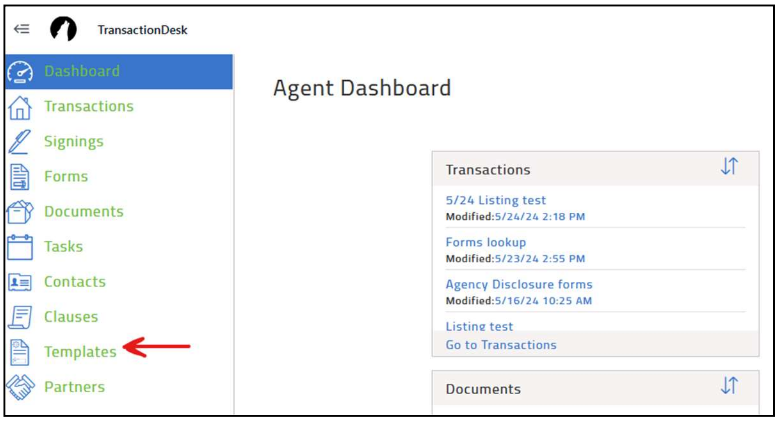
Setting up TransactionDesk Templates

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.

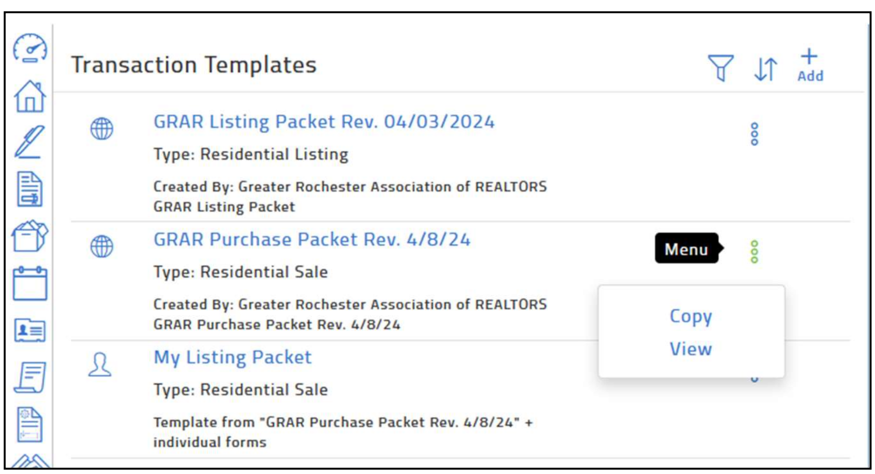


From here, you have two options:

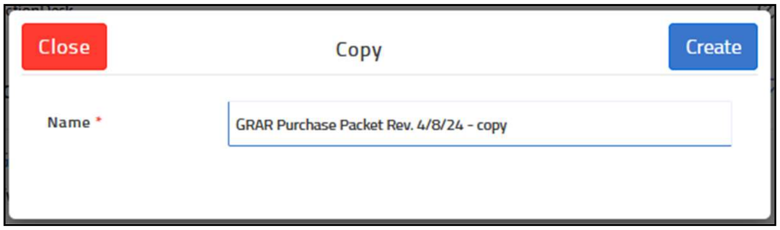
- Copy and Modify an Existing Transaction Template (from GRAR, your broker, etc.)
- Create a Template from Scratch

Copy and Modify an Existing Transaction Template

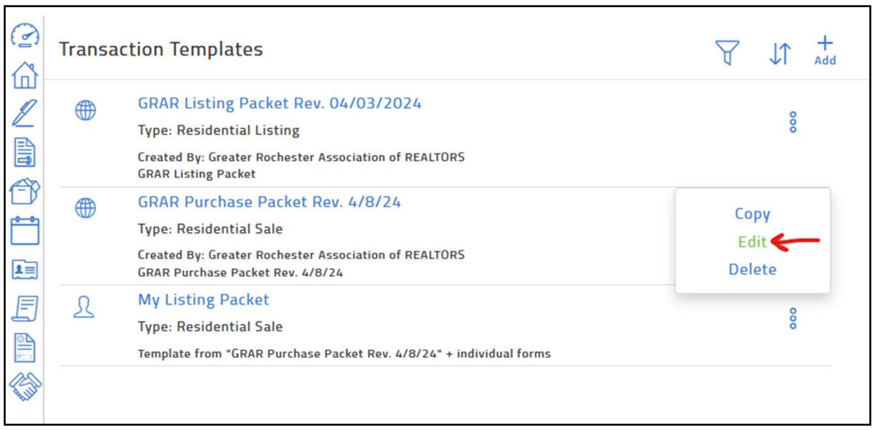
This option allows you to start with an existing template, and add or remove materials as needed. Most likely, you'll need to make a copy of the template to edit it. On your Transaction Templates screen, click the three dots to the right of your template. Click "Copy" to duplicate it.



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



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

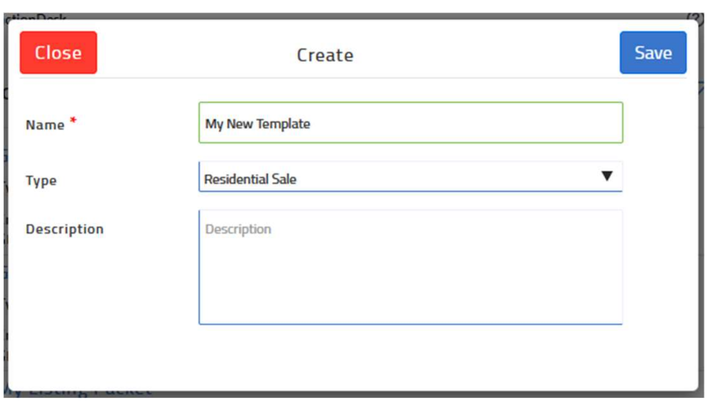


From here, you can add or remove forms and documents, add default transaction contacts, and share your template. See the rest of this guide for specific instructions to customize your template:

- 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.

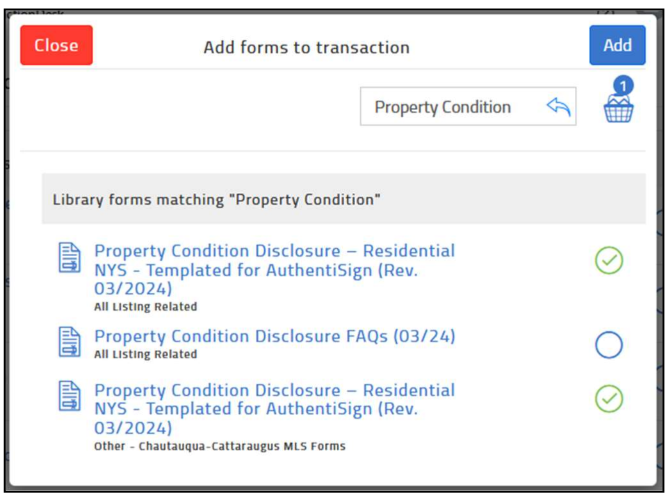


Add a New Form to a Template

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

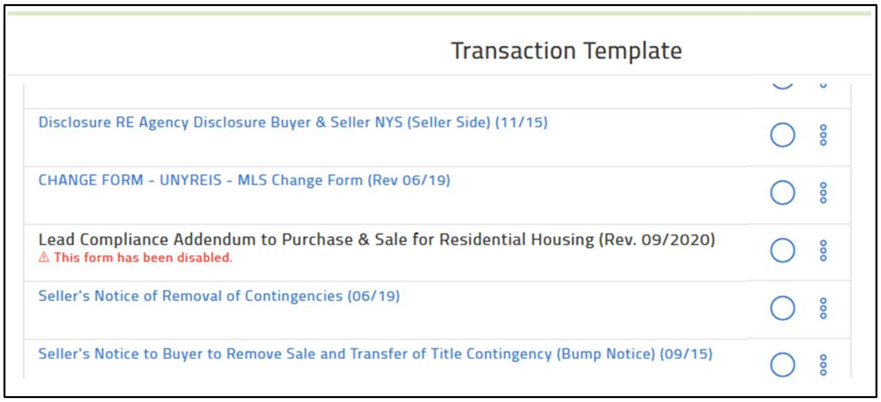
Search for the form you need, and select the appropriate version for your board/MLS. It will be added to your basket icon. Click the blue "Add" button at top right to insert the form into your template.

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

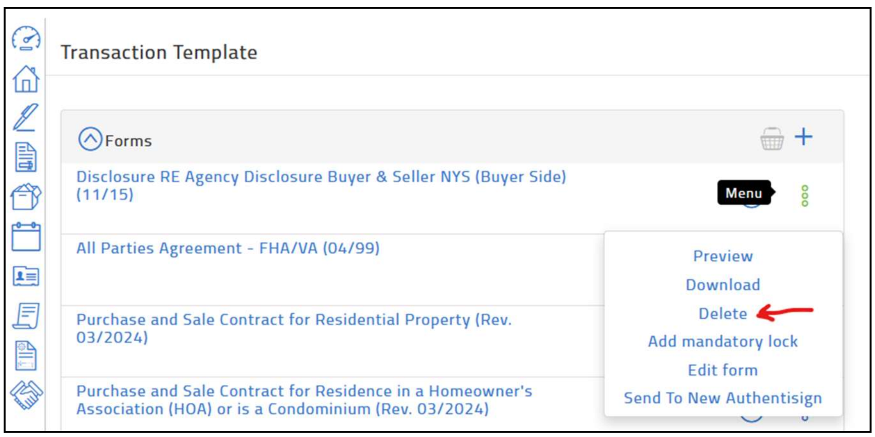


Remove a Form from a Template

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.



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

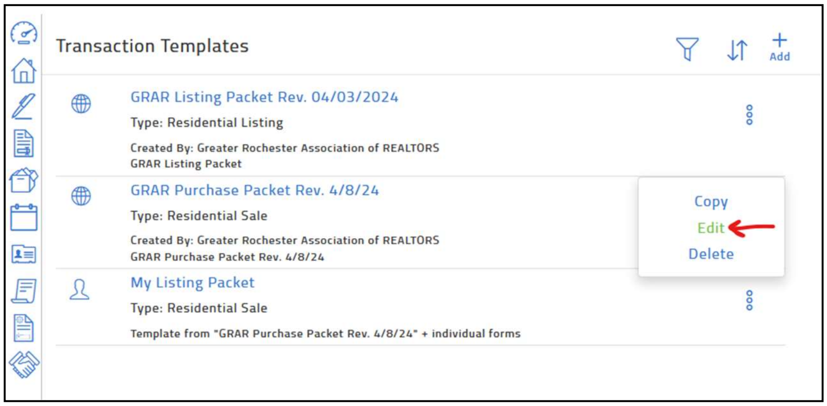


Note that templates based on your board's or broker's templates DO NOT update automatically—you will need to manually remove old forms and add in the new versions. You will also need to re-insert any pre-filled text on your template forms.

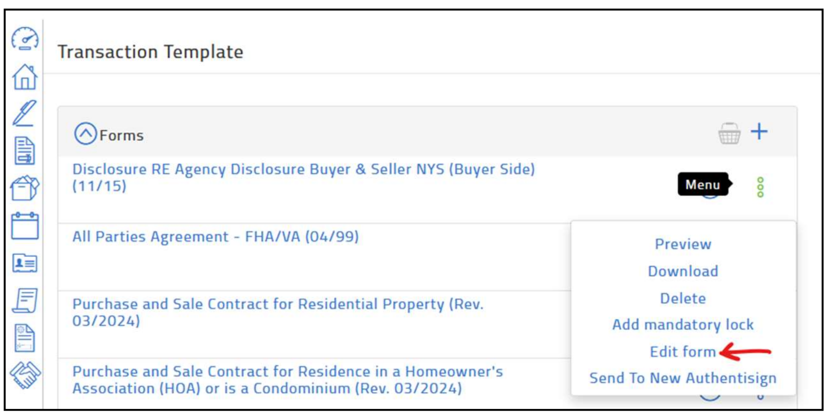
Add Pre-Filled Text to a Form in your Template

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.

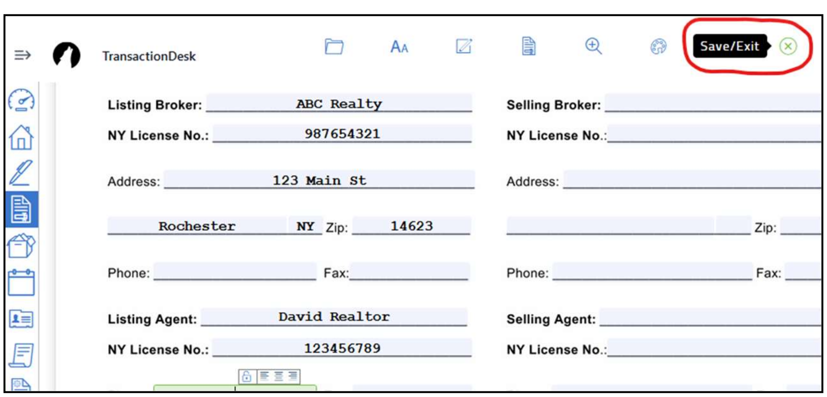


Scroll to the "Forms" section and find the specific form that you want to modify. Click the three dots at far right and choose "Edit form."



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.

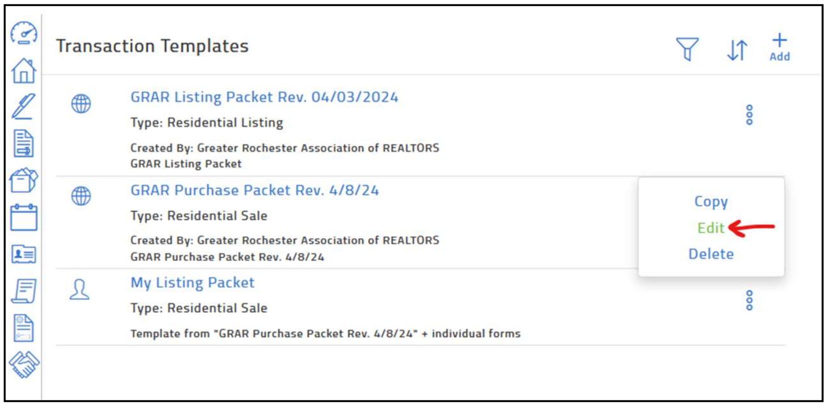
When you're finished, click the "X" to Save/Exit.



Include Default Contacts in your Template

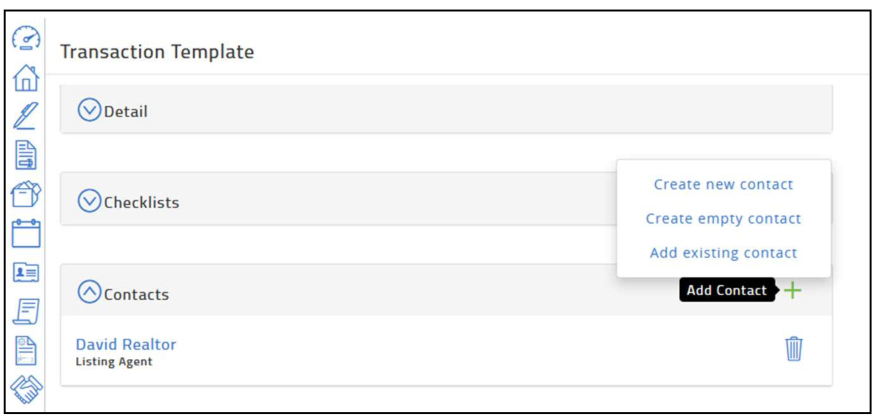
Use this feature to add default contacts that will be auto-filled into transactions created from your template. This could be your broker/team lead, real estate attorney, escrow company, etc.

First, choose the template that you want to edit.



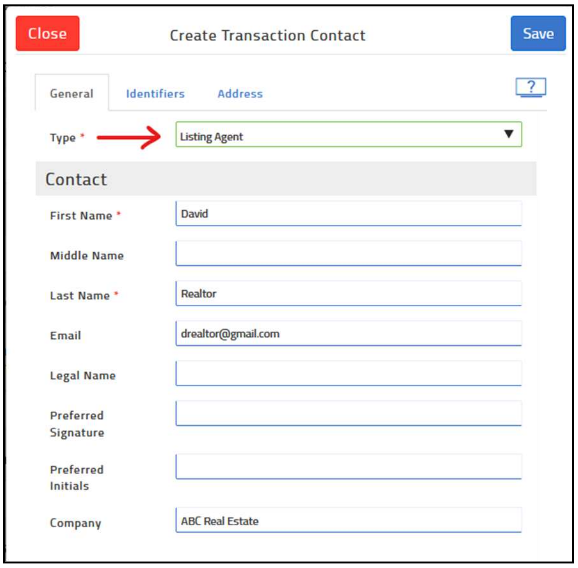
Scroll to the "Contacts" section and click the "+" sign to add a contact. You have three options:

- 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

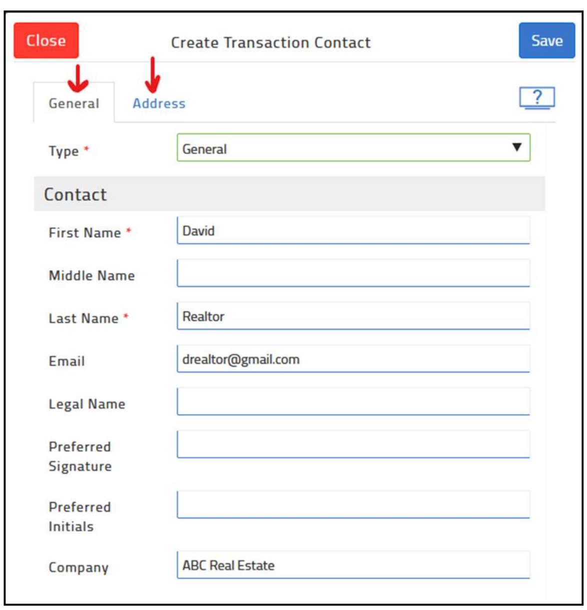


To add an existing contact, search for their name. Check the circle at right, and click the blue "Add" button to include them in your transaction template.

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.



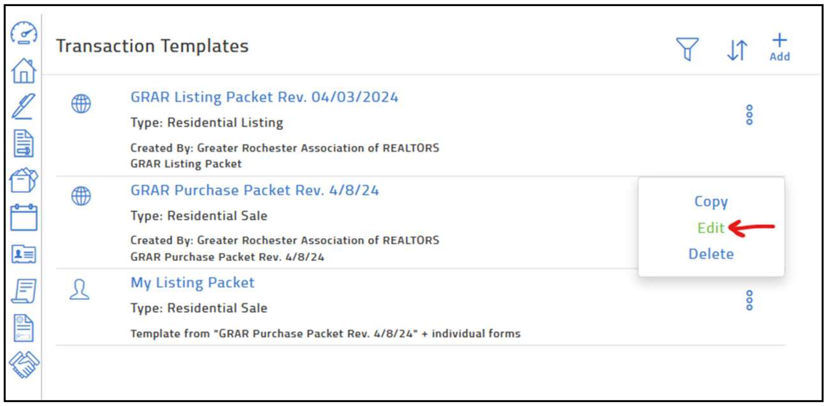
To create a new contact, first select their role at the top. Then enter their info into each tab of the pop-up window. When you're finished, click the blue "Save" button at top right.



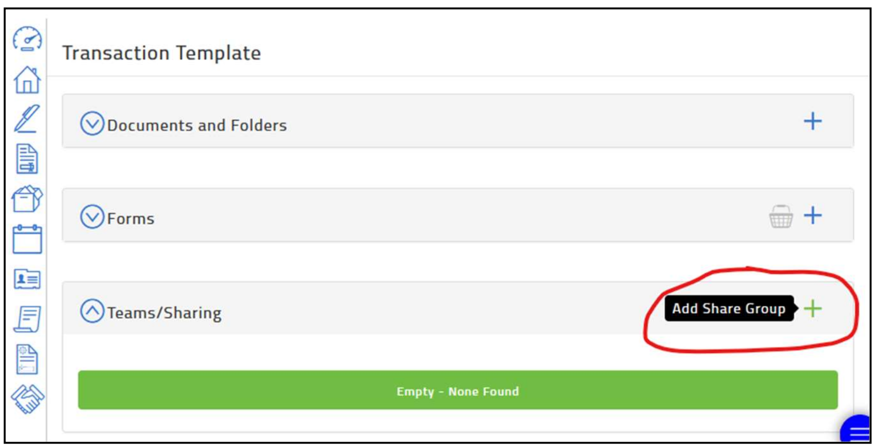
Share your Template with your Team or Office

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.

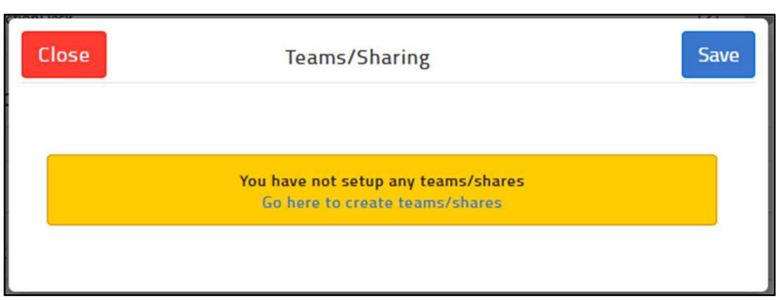


Scroll down to the "Teams/Sharing" section. Click the "+" sign at far right to share your template.



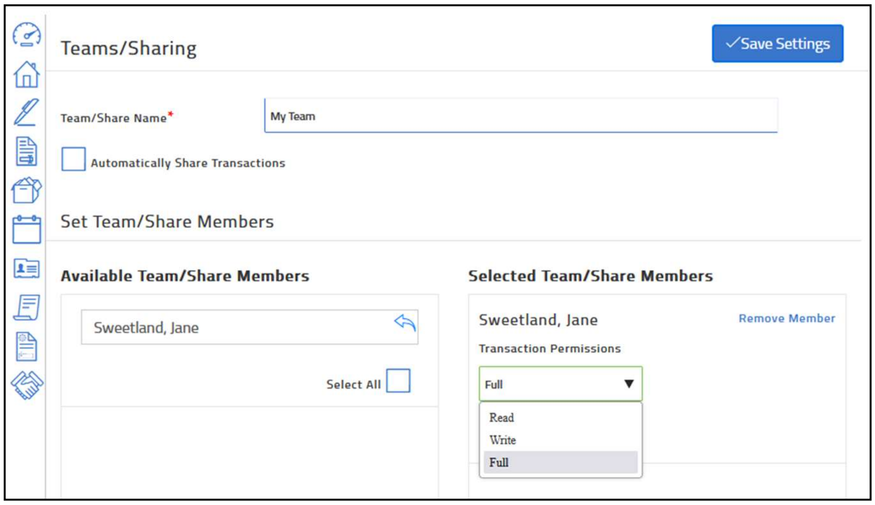
Share with a New Group or Team

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

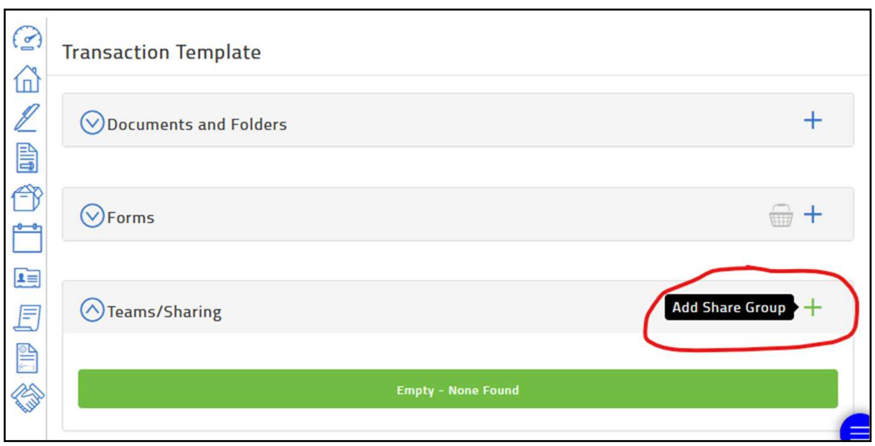


Then, name your team. In the left column, you'll see the available people on your team that you can share templates with. Search for a member, check the box next to their name, click blue "Add Members" button at the bottom of the screen.

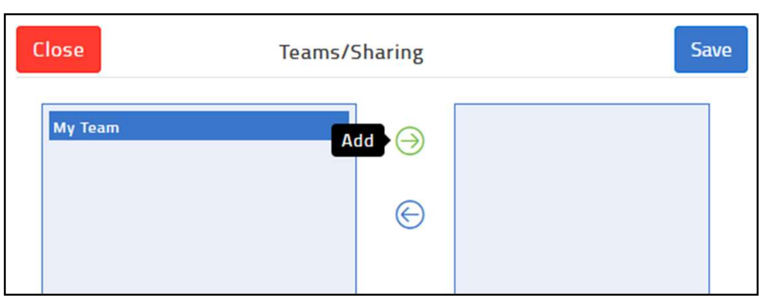
In the right column, set the permissions that you want each team member to have. When finished, click the blue "Save Settings" button at the top right.



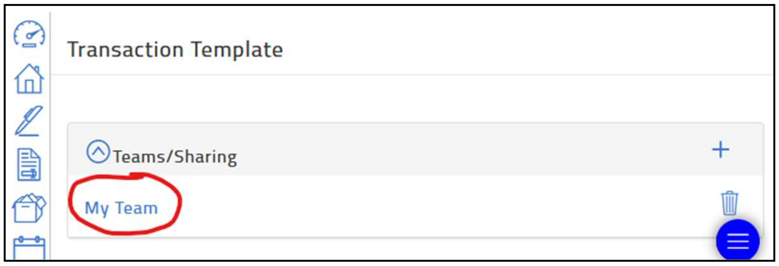
Now that you have a team established, return to your transaction template to add sharing permissions. Click the "+" sign to add sharing for the group you just created.



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.

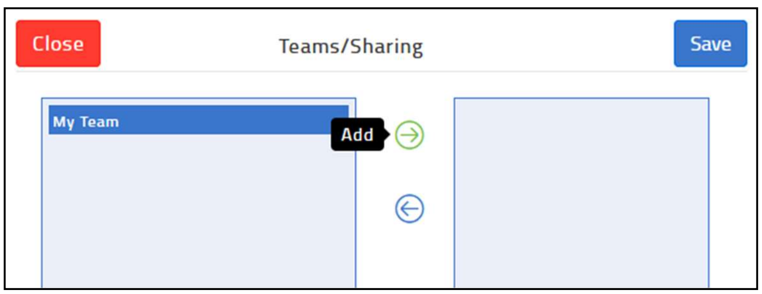


Now you should see your group's name in the template under "Teams/Sharing."

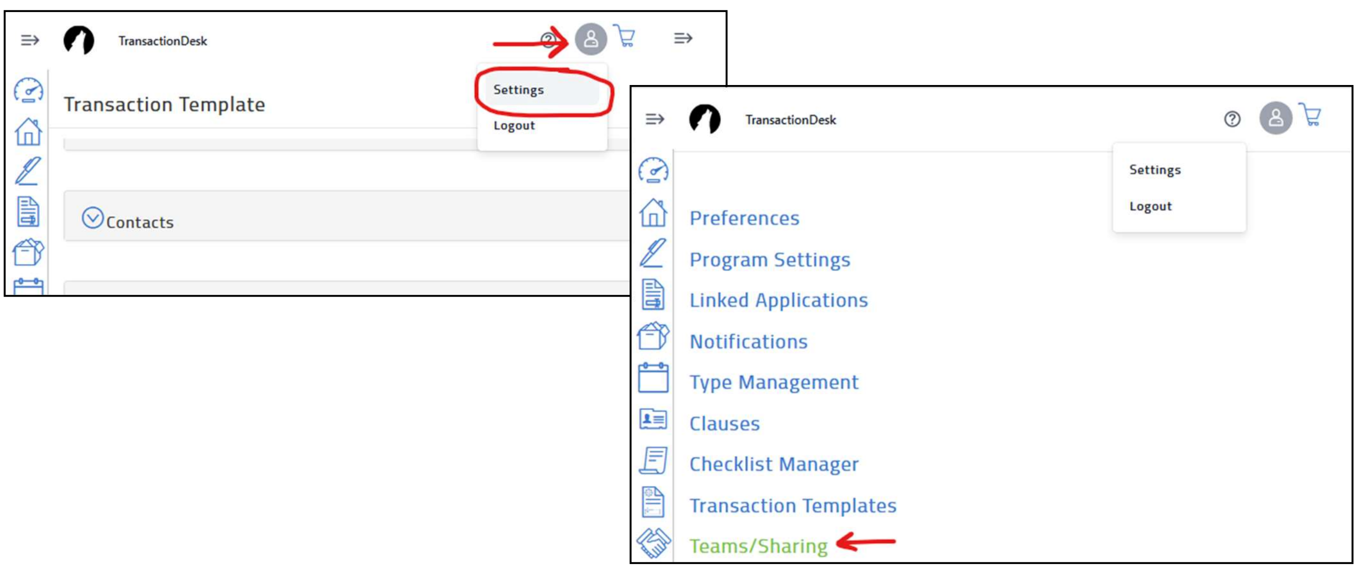


Share with an Existing Group or Team

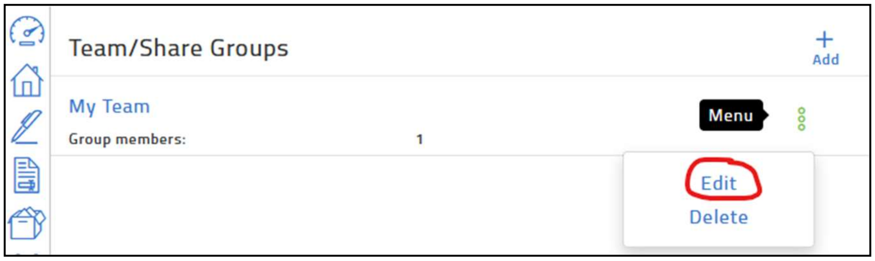
If you already have a group or team set up in TransactionDesk, select the group name and click the "Add" arrow. You'll see the name jump to right column. Click blue "Save" button at the top right.



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

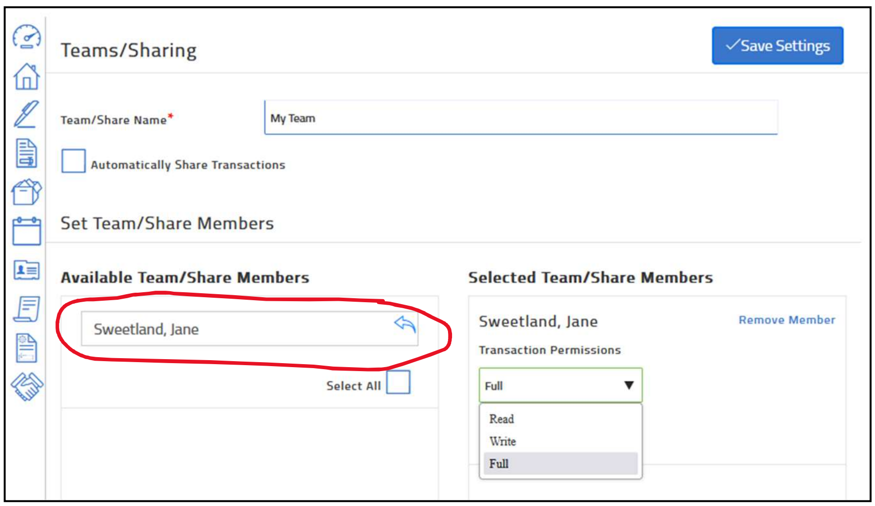


To edit a group, click the three dots at right and choose “Edit.”



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.

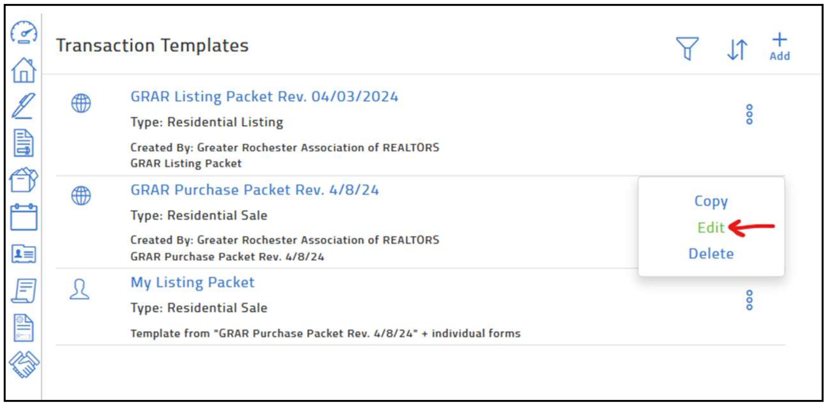
In the right column, set the permissions that you want each team member to have. When finished, click the blue “Save Settings” button at the top right.



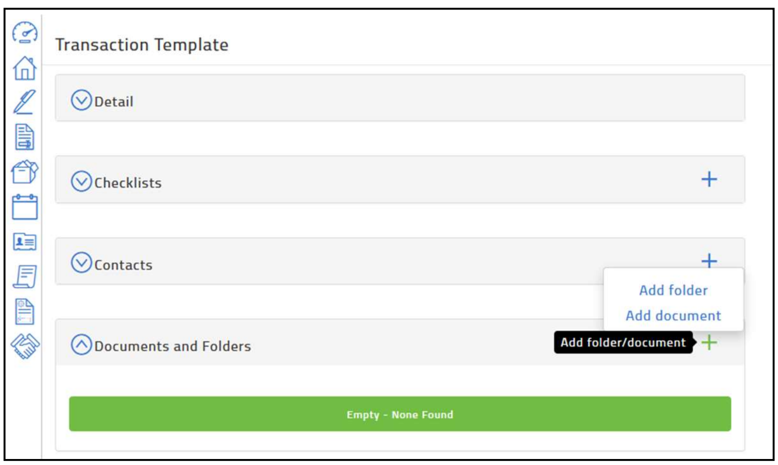
Now you’ll see the new member under your team/share name.

Add Documents or Folders to your Template

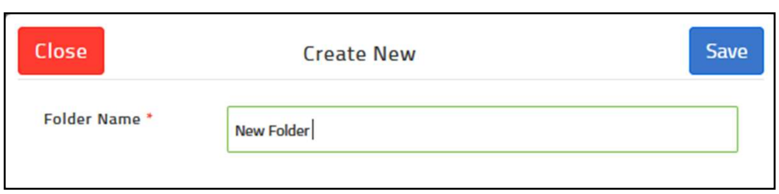
You can add default folders to a transaction template, and/or include documents from a variety of sources. First, choose the template that you want to edit.



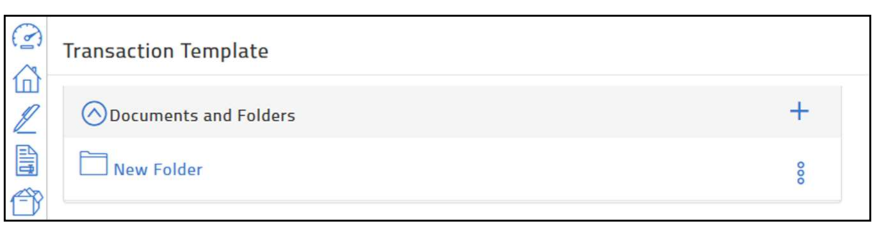
Scroll down to the "Documents and Folders" section. Click the "+" sign at far right and select "Add folder" or "Add document."



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

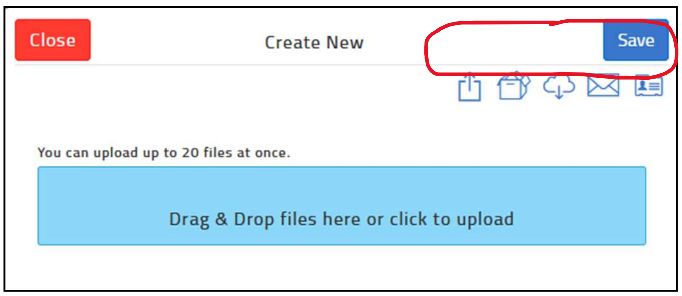


Now you'll see the folder in your transaction template under the "Documents and Folders" section.



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



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.