

TransactionDesk is now fully integrated with Matrix! Another step toward being truly paperless!

You can now create an MLS listing from a Matrix Data Entry Form in Transaction Desk (Instanet), have it signed electronically with Authentisign® or with ink on paper. Then, with one click, the data is uploaded to the MLS without any redundant data entry. The form can also be saved for future use, allowing the agent or brokerage to finalize and review the data before the listing is uploaded to the MLS.

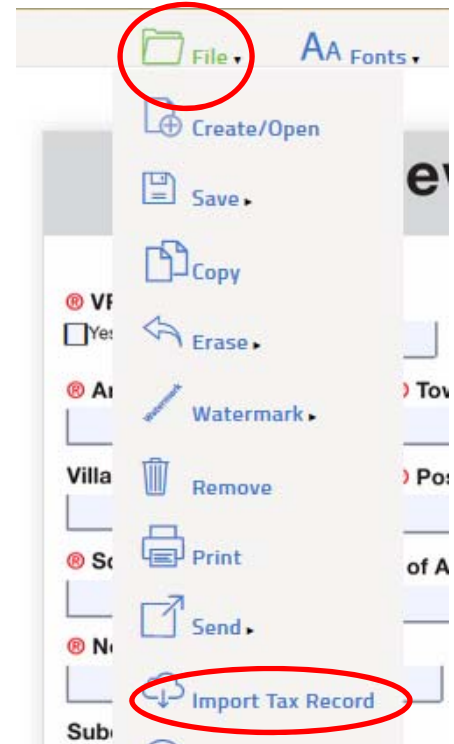
## Getting Started

To use TransactionDesk to fill out your listing data input forms for Matrix, do not use the 'Wizard' to pull data in from Realist when getting started. The import process **has to be done differently for the same fields to come in from Realist as you would see in Matrix**. See below for those notes on how to do that. Here are the added fields that would be missing if you started in the wizard, importing from Realist.

- Area, Assessed Value, Lot frontage, Lot Depth, Lot Square footage, Number of acres, Number of stories, Square feet total, Street direction prefix and Street direction suffix

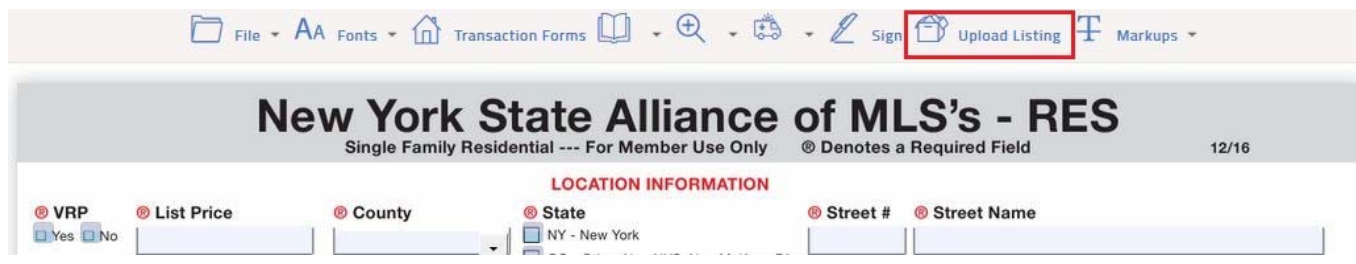
**How come?** When you import a Realist record while setting up a transaction initially, it can only populate what you see in the property details page in the Wizard (so the fields above do not come in).

**Try This Instead:** Instead, to populate all the possible fields in the input sheet with a Realist record, use the **'File – Import tax record'** option (see photo to the right) that is right in the form once you have it open. When you import it into the input sheet (instead of via the transaction wizard) you get more data imported.



**Next, enter a Tax ID and County or select the County, enter the Street Number and Street Name, click on Search, if it finds a match, click on Import.**

**Next step** is to fill out the form and send it for signing. In the meantime, you can upload the listing data to Matrix using the **'Upload Listing'** button that is in the top right of the form. See hints and notes below on this.



File AA Fonts Transaction Forms Sign Upload Listing Markups

## New York State Alliance of MLS's - RES

Single Family Residential --- For Member Use Only © Denotes a Required Field 12/16

**LOCATION INFORMATION**

VRP  List Price  County  State  Street #  Street Name  
 Yes  No

## Technology Tips

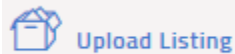
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P. 1 of 2

**GRAR Member Services** | M-TH 8:30am-4:30pm, Fri 9:30am-4:30pm | **585.292.5000** | GrarHelpDesk@grar.net

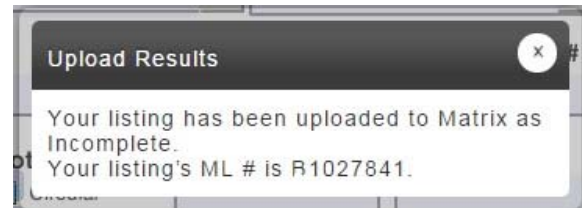
**Matrix MLS Support** | Contact AnswerLink M-F 8:30am-8:30pm, Sat-Sun 8:30am-3:30pm | **888.825.5472**

Last update: 31-Oct-17



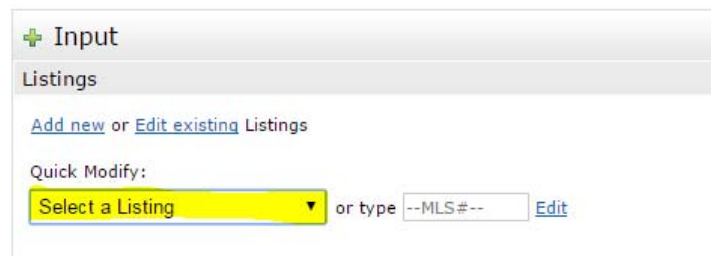
**Good to Know:** Whenever you hit 'Upload listing' in Transaction Desk, Instanet will send all the information over to Matrix, assign an ML# and save it as an Incomplete Listing.

You will then get a box like this with your ML# in it (Hint - write it down in case it doesn't show up in Matrix so we can help you track it down)



**If you need to make a change to the info on the sheet, do not correct it in Transaction Desk and resend or you will create a second incomplete listing** (you will then need to delete one of the two in Matrix). It will not update the same incomplete listing you previously sent. So, if you click on 'upload listing' on the same form 4 times, it will generate a different MLS number each time.

The listing will not immediately appear on your home screen in the My Listings Box. To locate the listing, you will need to go to the Add/Edit Tab and select it from the drop-down list



## Other Transaction Desk Tips

**Did you know you can also start transactions directly from the listing in Matrix? Want to start a purchase offer?** Simply click on the green Instanet/Transaction Desk logo above the listing photo on a REALTOR Full or from a single line display in Matrix and start a transaction instantly in TransactionDesk. Information from the listing, including all attachments/supplements, will be automatically added to the transaction, so you don't have to input it yourself.

**Try it out and let us know if you have questions or contact Instanet Support, 24/7/365 at 800-668-8768. Need training? Click on the question mark on the bottom, left of your Transaction Desk for access to a ton of short videos or check [grar.org](http://grar.org) for upcoming sessions.**