

Teams and Transaction Templates in TransactionDesk

Did you know that you can use transaction templates to do many things on forms in TransactionDesk that you are possibly doing each and every transaction? This can be a big helper for teams who want consistent info in the admin section of the purchase offer as one example.

While you can create a transaction template and share it with your teammates, you should know that when you share a transaction template, the transaction template itself is not made available to your teammates; instead, transactions you create using the template are automatically shared to those listed in the sharing group in the template. **Hence, you need to set up the template for each team member if you want to all use the same one.**

For each Team Member:

1. In TransactionDesk, go to **Settings** and then **Transaction Templates**. Tip - You can copy the existing GRAR Listing or Sale Packet to avoid having to pull in all the forms or start fresh.
2. You may want to consider at least one template for listing transactions and one for sale transactions.
3. You can add any contacts that are common to your transactions, if there is such a person(s).

4. Once you add the forms, you can **click on each of them to pre-fill in any field you like as a template**. If your team always puts the same thing in some fields, you can fill it out on the template. Ex. Fill in NY for the state and Monroe for the county if most deals are in Monroe (or whatever county). You can change any of these on the live form in a transaction if you have a deal that is an exception.

Ex. On the Purchase Offer Admin page, you can prefill that whole section how you want it to look for all on the team. See screen here for ideas to get you thinking. The team leader/members can decide how to fill it in.

5. **IMPORTANT! The trick when using the template for a sale transaction is as follows:**

- a. When clicking on the TransactionDesk icon from a listing in Matrix to get to the Wizard in TransactionDesk, you can pick this template once created.
- b. If you do create a template and pre-fill the complete Selling Agent section of the Purchase Offer, **you will then not select yourself as the Selling Agent in the wizard, you will select 'Neither' so that it won't overwrite what you have entered in the template.**

<u>SELLING REAL ESTATE BROKER</u>			
Test Office			
Selling Broker			
1234588			
NY License No.			
10 Min Street			
Address			
Rochester		NY	14559
City, State, Zip			
585-292-5000		585-292-5008	
Phone		Fax	
Joe Jackson Buyers Agent/Leaders Name Team			
Selling Agent			
1234567896			
NY License No.			
585-292-1234			
Phone		Fax	
585-341-1234		12345 (Team Leader)	
Cell		Public ID#	
Joe@office.com (Buyer's Agent)			

To learn more about **Teams** in TransactionDesk, click on the **question mark icon in the left column** while in TransactionDesk and then **Guides** and search **Teams**. Call LoneWolf Support 24/7 for additional info at **800.668.8768**.