Setting up 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? Keep reading to learn what a transaction template is, why it is useful, and how to create one.

A transaction template defines a standard set of forms, documents, and checklist items that simplify the process of creating a transaction. For example, you have certain forms and documents required for a residential listing. You also have a list of tasks that apply to most residential listings. You can create a template called "Residential Listings" and attach the forms and documents, and add a checklist to it. Then, each time you create a transaction for a residential listing, you only need to apply the Residential Listings template: All of the forms, documents, and checklist items required are automatically added to the transaction.

It is recommended that you create a checklist to be used with the template, and attach it to it. A checklist ensures that all documents and tasks associated with this type of transaction are attached and completed. The checklist establishes due dates for tasks, and reviewers for documents.
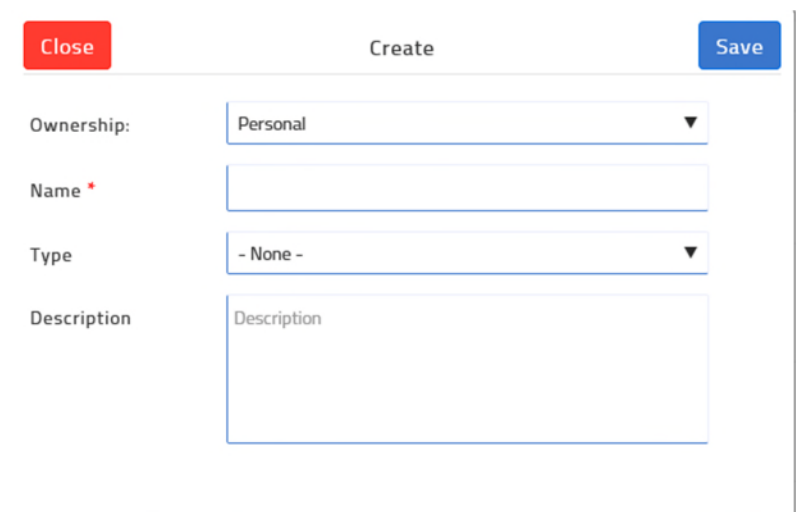
Before you begin

Note – for brokerages, you will need to have TransactionDesk Edition for brokers, and Super User access to create transaction templates for an office. You can, however, share a transaction template with your team members using the Sharing option.

Before you can share a transaction template with a group or team, the group must first be defined.

Before you can add a checklist to a template, the checklist template must be defined.

Steps

1. Navigate to Settings ⚙ .
2. Select **Transaction Templates**. The list of existing templates is displayed.
3. Click **Add**. The Create Transaction Template page appears.

4. Use the **Ownership** dropdown to select who owns this template: **Personal** if it is for your own use, or to be shared with your team, or **Office** if it is to be available to all agents in the office.
5. In the **Name** field, give the template a meaningful name, such as Residential Listings.
6. Use the **Type** dropdown to select the type of transactions this template should be used for.
7. Optional: In the **Description** field, enter a description for the template.
8. Click **Save**. The Transaction Template page appears.

9. To add a checklist to the template that would be common to all transactions of that type, in the **Checklists** section, click **+**. The list of checklists appears. Select one or more checklists, and click **Add**. Any transactions created from this template have the checklists attached automatically.

10. To add a contact to the template that would be common to all transactions of that type, such as escrow company, in the **Contacts** section, click **+** and create or select the contact. Any transactions created from this template have the contacts added automatically.

11. To add the documents that are typically required for this type of transaction, in the Documents and Folders section, click **+**.
    a. If you want to add individual documents, select **Add document**, add the documents, and click **Save**.
    b. If you want to add a folder to organize the documents, select **Add folder**, give the folder a name, and click **Save**.
    c. If you want to add a document to a folder you created here, click on the folder name to open the folder. Then click **+,** select **Add document**, and add the documents that you want in that folder, and click **Save**.

12. To add the forms that are typically required for this type of transaction, in the **Forms** section, click **+** and locate and select (check) the forms. Click **Add**. Any transactions created from this template have the forms attached automatically.

13. To share this template with your team, in the Sharing section, click **+**.
    a. In the left column, select the name of the group to share with.
    b. Click the right arrow to add the group to the list to share with.
    c. Click **Save**.

14. Click **Update**.