Beginning July 11, 2023, whenever an agent moves to a new brokerage, transactions will stay with the originating brokerage in TransactionDesk. There is nothing that the agent needs to do as this change will happen automatically.

Departing agents will receive PDF copies of the transactions.

If your office has the **Enable Transaction Transfer** setting set to **Yes** (which will be the default setting **effective on July 11, 2023),** then when an agent leaves a brokerage to go to another, the transactions that were created while at the prior brokerage are automatically transferred to the Primary Super User (which is usually the DR) for that firm/branch. When transaction(s) are transferred, the agent will automatically receive an email from TransactionDesk which includes a list of all transactions that have been moved, and a link to each one.

The links enable the agent to download a PDF of each transaction including any documents attached to the transaction. The agent can save the PDF to access in the future if desired. The PDF file name will have the same as the transaction name in TransactionDesk.

FAQs

Q. **How does a firm know who the "Primary" Super User is?**
A. In order to set a Primary Super User, the broker can reach out to the LoneWolf support team at tdsupport@lwolf.com. Otherwise, the files will transfer to the Super User with earliest login which may or may not be the Designated REALTOR. When a primary Super User is set, the star beside their name in the agent list (in Broker Tools in TransactionDesk) will be green.

Q. **Will brokerages be able to control which agents get the transaction pdf's or does it have to be all or none?**
A. The brokerage will set it per office, and it is ON or OFF. There are no user specific controls, it is all or nothing, but can be changed by the broker any time.

Q. **Will brokerages be able to allow some transactions to transfer with an agent or does the broker keep all?**
A. If they have Transaction Transfer set to "Yes" (which will be the default beginning July 11, 2023), then all transactions will transfer to the brokerage's Primary Super User. That Super User can then decide which transactions they wish to release back to the agent, to another agent or to stay in the Super User's account. Its documented here https://community.lwolf.com/s/article/TDE-Transfer-a-Transaction-to-Another-Agent

Q. **Can brokerages decide to not allow the departing agent to receive the PDF email links?**
A. Yes, the Super User can turn off TransactionTransfer temporarily until after transfer of that agent is complete. Then they can turn it back on for the next transfer if desired. Remember, transactions that the agent transferred in from previous broker (if they had transferred another time before most recent brokerage) will still go with the agent.

Q. **Is it "closed" transactions only that will transfer or will any status transaction go to prior broker's Super User?**
A. All transactions that "originated" with the broker will stay with the broker and be assigned to the primary Super User (open or closed). Any transactions created by the agent <u>with a previous broker (if they moved before this most recent brokerage)</u> will go with the agent (should be mostly closed transactions in this case).

Q. **Can brokerages stop agents from deleting transactions, prior to leaving?**
A. Yes, the broker is able to prohibit this at the office level, not user level. Go to Office Settings > General > Allow Agents to Delete Transactions = No. This however will disable the ability to delete transactions that they want to remove for whatever reason for all of the agents in that office. This will be problematic for some.

We often get asked about record retention with regard to your transactions, so it seems like a good time to review this. Did you know that only the broker is required to retain records once a transaction closes? Need a refresher on DOS Document Retention Rules, keep reading.