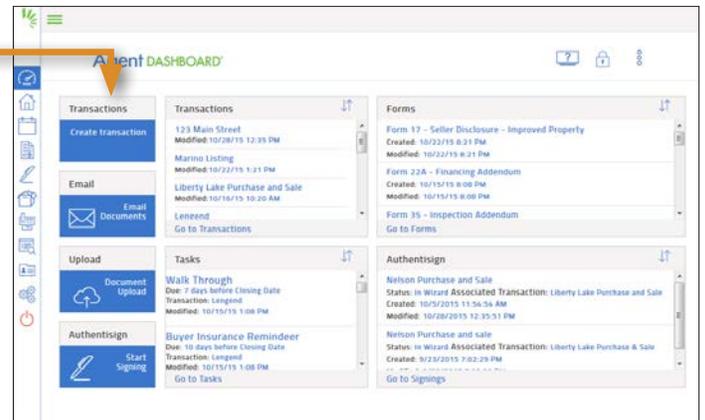# Transaction Desk

Create a Listing Transaction

Transaction Desk provides a step-by-step wizard that allows you to effortlessly create a "listing" transaction. You can quickly select, auto-fill, and complete listing forms; store listing transaction documents; upload additional documents to your transaction; and email or send the listing transaction for a paperless signing with Authentisign.

STEP 1:   Create a Listing Transaction

1.   Access Transaction Desk and click the "Create a Transaction" action button.

2.   Enter the required information

1   Enter the Transaction Name (e.g., the property address or client name)

2   Choose a Template (Optional)

A template will automatically add specific contacts (e.g., a title representative), forms, and documents (e.g., transaction checklists or office brochures) to the transaction. You and your office can create or edit templates by clicking the "Setup" icon in the far left menu and choosing "Transaction Templates". Watch the online video to learn more!

3   Select a "Listing" Transaction Type

4   Select an Import Option (not required):

Import from RPR: Auto-fill data from the county tax records in RPR by choosing it from the drop-down menu and then select the county and enter the Tax ID number. **TIP:** If you do not know the Tax ID number, click the Magnifying Glass icon and enter the full property address to search and select the property.

5   Select Your Role: Choose "Listing Agent" or "Dual Agent" as appropriate.
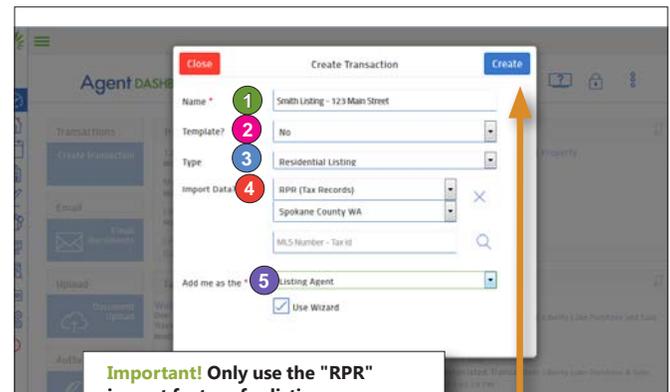
Important! Only use the "RPR" import feature for listing transactions. The "Paragon" import feature can only be used for sale transactions.

3.   Click "Create" to continue

STEP 1: Create a Listing Transaction (cont.)

4. Complete the Details Tab

   1 Fill in or edit the property information and listing price

   2 Click "Next"

5. Add Transaction Dates

   1 Fill in any applicable dates that you would like to auto-fill into the listing forms. You can also fill in the dates later, or enter them directly into the forms.

   2 Click "Next" to continue

6. Edit, Add, and Delete Contacts

   To Edit a Contact:

   Click the contact's name, edit the information and click "Save" to return to the Transaction

Transaction Desk

STEP 1: Create a Listing Transaction (cont.)

6. Edit, Add, and Delete Contacts (cont.)

To Add a Contact:

1 Select "Add New" and choose "Create new transaction contact"

2 Add your seller as a contact to auto-fill their contact information into the transaction forms

- Choose "Seller" as the contact type
- Enter their name as you would like it to appear on forms
- Enter their email address
- Keep "Add to Address Book" checked to save to your Contacts
- Click "Save"
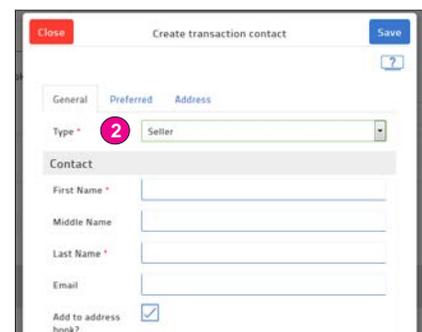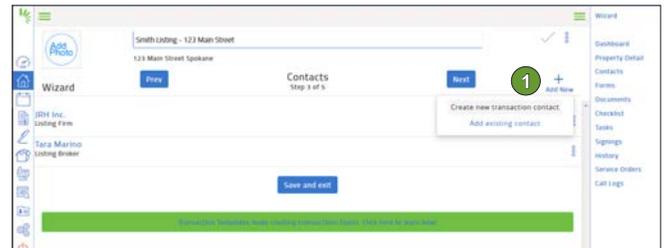
To Delete a Contact:
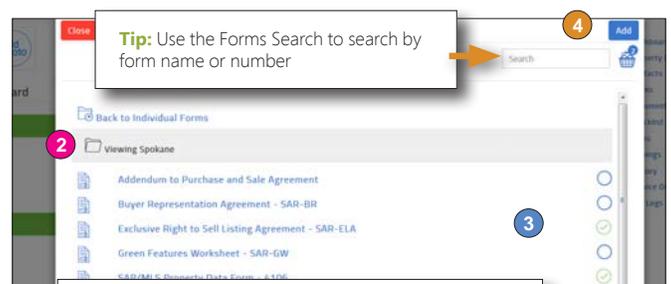Select the circle menu to the right of the contact's name and choose "Delete"
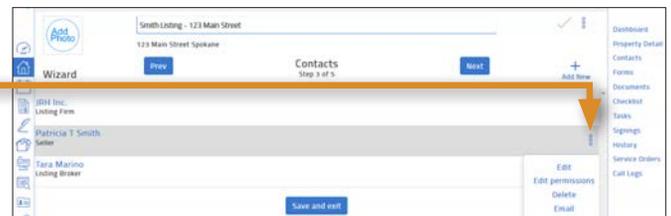
Click "Next" to continue

7. Add and Fill-in Forms

Add Forms:

1 Select "Add New"

2 Click on a folder to expand the selection

3 Select your forms. You can press and hold the CTRL key while clicking to select multiple forms

4 Click "Add"

Tip: Use the Forms Search to search by form name or number

Tip: You or your office can create a "Template" to add forms automatically to a transaction. Watch the online video to learn how!

Northwest Multiple Listing Service®

STEP 1: Create a Listing Transaction (cont.)

7. Add and Fill-in Forms (cont.)

Email Form 17 to Be Completed Electronically:

Form 17 must be filled out by the seller and therefore will not auto-fill with the transaction details. After you have added Form 17 to your transaction, simply email the form as an "editable" form for the seller to complete electronically.

① Click the circle menu to the right of form.

② Choose "Send..."
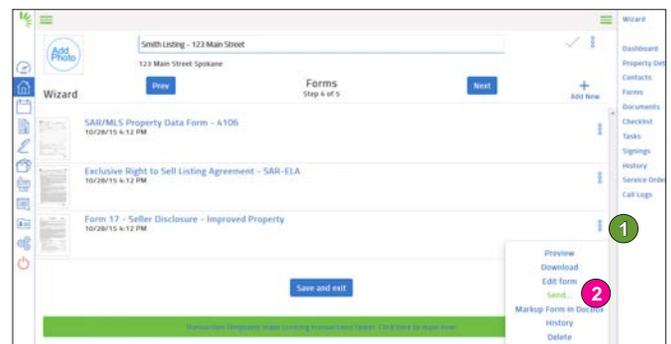
The "Send" options will appear, choose "Email"
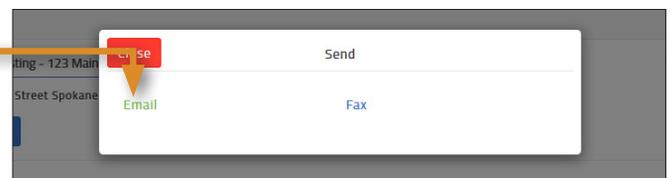
From the "Email" pop-up:

③ Choose "Send as a link"

④ Check "Allow editing of forms?" box

⑤ Click the contact icon and select your seller's name

⑥ If desired, add a message to your client

⑦ Click the "Send" icon to send the link to your client. When they are finished filling in the form, your client can simply go to the "File" menu to save their edits and the filled-in form will be saved into your transaction.

Note: If you prefer, you can also email the form as an attachment for the seller to print and fill out by hand. Once you receive the completed form from your seller, upload it to the "documents" section of the transaction.
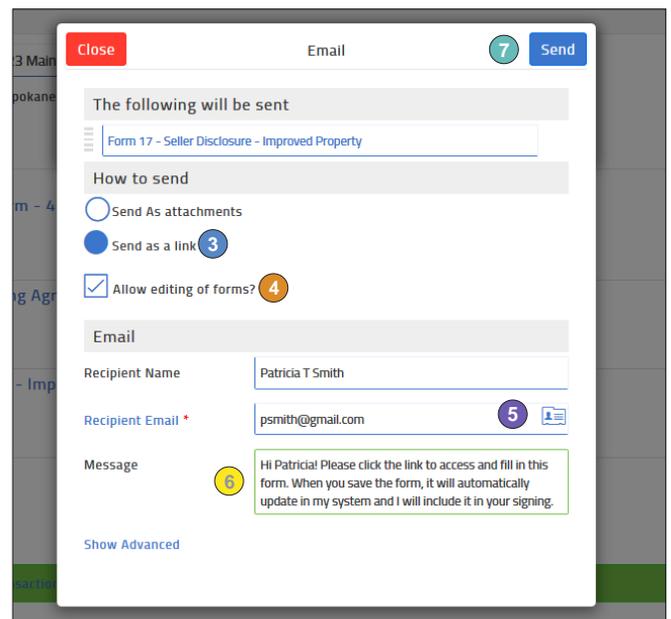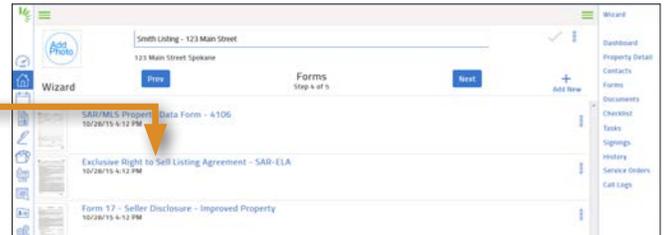
Transaction Desk

STEP 1: Create a Listing Transaction (cont.)

7.   Add and Fill-in Forms (cont.)

Fill-in Forms:

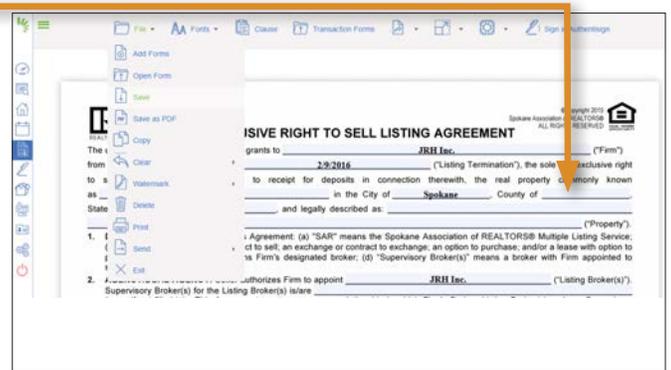- Click on the Form Name to open the Forms Editor.

- Type in the missing information to complete the form.

   IMPORTANT:
   If you enter or change information that is found on other forms, the entry or change will automatically populate into all forms throughout the transaction. For example, if you edit the property address, it will be edited on all forms.

- Save your changes by going to the File menu and choosing "Save". If you want to save the form to your computer rather than saving in Transaction Desk, choose "Save as PDF".

- Continue to the next form

    - Click on the Transactions Forms button in the middle of navigation bar
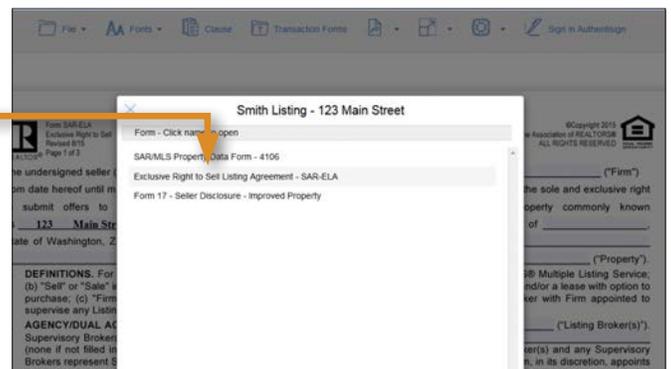
    - A pop-up window will appear

    - Click on the next form to open the form in the editor

- Once you have completed filling in all forms in the transaction, go to the File menu and choose "Exit" to return to the Transaction Details page
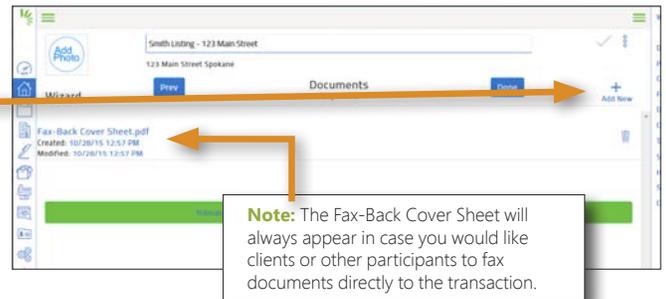
- Click "Next" to continue

STEP 1: Create a Listing Transaction (cont.)
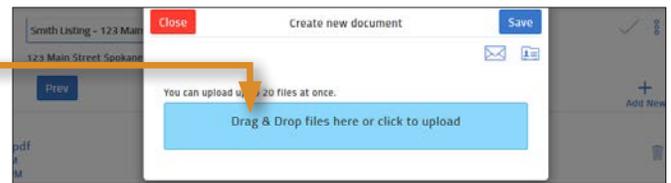
8. Upload Documents To Your Transaction

You can upload additional documents, signed forms, or disclosures that you would like to store online or include in an electronic signing.

To Upload Documents:

● Click on "Add New"

Note: The Fax-Back Cover Sheet will always appear in case you would like clients or other participants to fax documents directly to the transaction.

● Click on the Blue Box to access your files.

● Double click on a file to upload it into your transaction.

To Upload a Document via Email:

● Click "Add New", and then click the Envelope icon

● Copy your transaction email address. This address is specific for your transaction. Anything you send to that email address will automatically upload into the documents section.

1. Copy the email address
2. Open your email account
3. Click forward on the email you would like to upload
4. Paste in the Transaction Desk email address. The email chain and any attachments will be uploaded into the Documents tab of the transaction.
5. Send the email
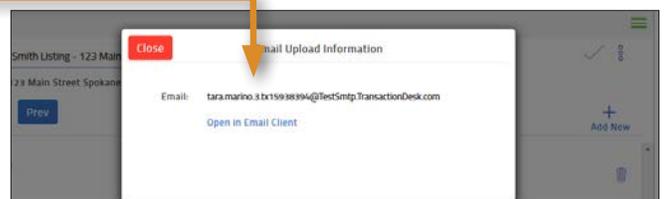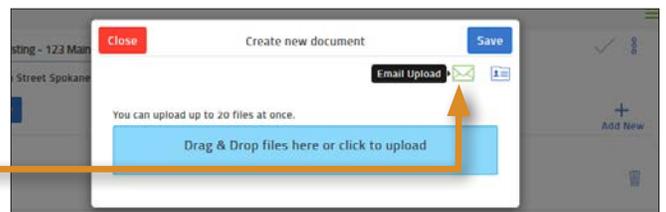
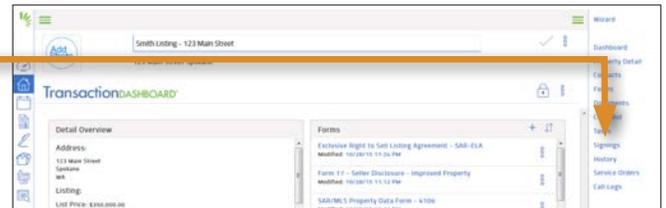● Click "Done" to exit the wizard and go to the Transaction Dashboard
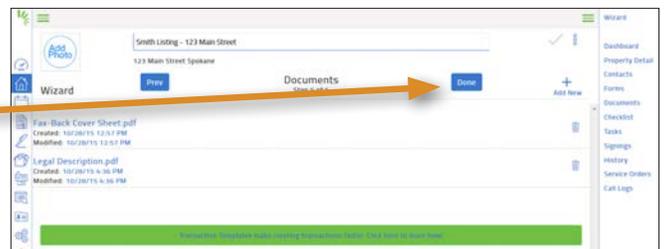
STEP 2:   Send Using Authentisign or Print, Email, or Fax
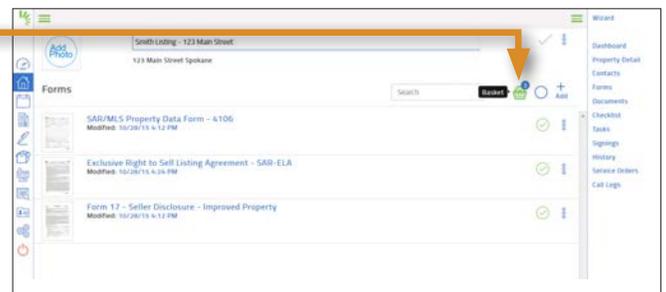
To Access Authentisign:

- Click "Signings" in the transaction menu

    Note: Please see the Authentisign user guides for details on creating and sending electronic signings.

To Print, Email or Fax:

- Click "Forms" or "Documents" in the transaction menu

- Select the forms or documents, and click on the Basket icon to email, print or fax

Your entire transaction, including forms, documents, contacts, and change history will be saved in Transaction Desk.