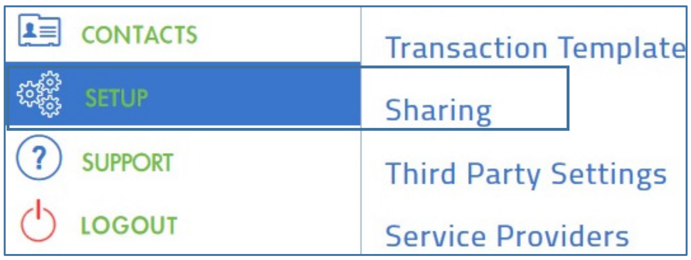
Sharing Transactions

TransactionDesk allows you to create Share groups which can be used to share transactions with other people in your office. Permissions allow you to grant Read, Write, or Full Access to your transaction. This is an easy way to coordinate a transaction among team members.

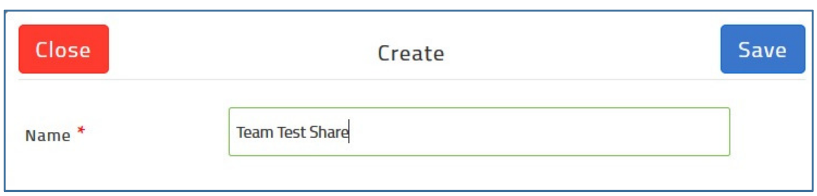
To setup a **Share Group**:

In TransactionDesk, select **Setup** from the left hand menu and then choose **Sharing**.

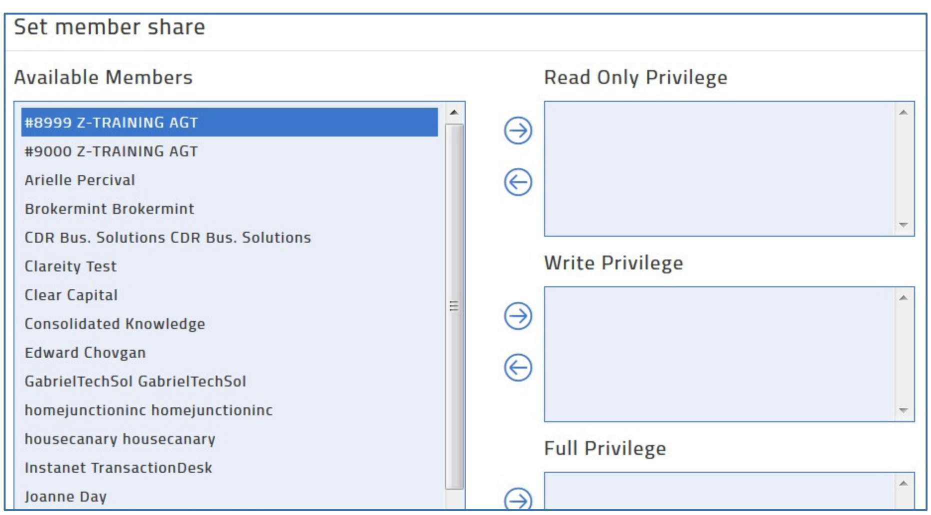


On the **Sharing Groups** page, click the **Add** button. 

In the **Create** dialogue, give the Share Group a descriptive name and click **Save**.



On the next screen, you will select the Share Members. Click the name of the person you want to include in the Share Group and click the right pointing arrow to assign them Privileges.



Privileges are:

Read Only – allows the member to view the transaction only.

Write – allows the member to modify forms, but not delete anything.

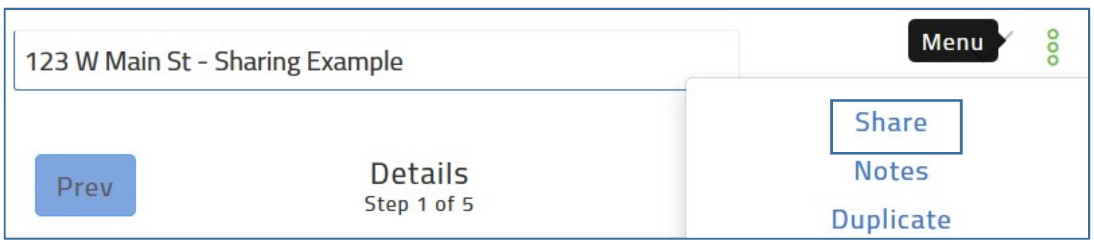
Full – allows the member full access to the transaction.

Once you have assigned all the members to their privileges, click the **Update** button. 

Your Share Group is setup and ready to use.

Assigning a Share Group to a Transaction:

From the TransactionDesk Dashboard, select the name of the transaction you wish to share. When you are at the TransactionDashboard, click the three circle menu and select **Share**. *(Tip: When you are creating a new transaction, in the wizard, you can do this from the Details step as well.)*



Select the name of the Share Group(s) you want to share the transaction with and click the right arrow. Once the groups are all included, you can select to notify the members as well as include an optional message. Click **Save**. Group members will be able to see the shared transaction(s) in their transaction dashboard.