



Transaction Desk - Lone Wolf Integration Overview

Configuration

1. The TransactionDesk user responsible for importing Lone Wolf data needs to setup a Lone Wolf username/password in their TransactionDesk account settings. This is only available to single/multi-office super-users and the Lone Wolf username must be unique.

The screenshot shows the 'General Preferences' window in TransactionDesk. It includes several sections: 'General Preferences' with checkboxes for 'Enable pop-up reminders' (unchecked), 'Enable Easy As 1-2-3 mode' (checked), and 'Enable Tech tips' (checked); 'When I log in, I want to go to:' with radio buttons for 'The Basic View, the basic TransactionDesk homepage.' (selected), 'My Desktop, which shows an overview of: Tasks, Appointments, Documents, and Transactions.', 'InstanetForms so I can work on forms and contracts.', and 'The Transaction I last accessed while working in TransactionDesk.'; 'Lone Wolf' with a checked box for 'Enable Lone Wolf integration.' and input fields for 'UserName: NRA' and 'Password: *****'; and 'Time Zone' with a dropdown set to '(GMT-5) Eastern Standard Time' and a checked box for 'Adjust time for daylight saving changes'. At the bottom right are 'Save Settings' and 'Return To Settings' buttons.

2. The Lone Wolf application needs to be configured for TransactionDesk Integration; this can be accomplished from the Company Profile interface, shown below(LONE WOLF Shortcut E.1.1). The Lone Wolf username/password needs to be entered during this step, shown on the second screenshot shown for this step.

The screenshot shows the 'Company Profile' window with the 'Interface' tab selected. The 'Interface Options' section contains: 'Label Writer: Lone Wolf Default' (dropdown), 'Create Wells Fargo File: No' (dropdown), 'Integration Source: Instanet Forms (TransactionDe)' (dropdown) with a yellow 'Configure' button next to it, 'Recruiting: None' (dropdown), and 'Credit Card Processing: None' (dropdown). The 'Email Options' section includes: 'Outgoing Mail (SMTP):' (text input), 'Send Emails From: User' (dropdown), and 'CC Error Emails To:' (text input). At the bottom are 'Store', 'Print', 'Cancel', and 'Exit' buttons. The system tray at the bottom right shows 'INS', 'NUM', and 'CAPS' indicators.

Integration - Field Synchronization [E.1.1.I]

Integration - Field Synchronization

Integration Source: Instanet Forms (TransactionDesk)

Web service URL: <http://www2.transactiondesk.com/Webservices/CDMTransactionWebService/CDMTransactionService.aspx?>

Username: Password:

Field To Synchronize: **Match Up Classifications:**

Instanet Forms (TransactionDesk)	Lone Wolf RMS
Our agent on listing side only	LISTING SIDE
Our agent on selling side only	SELLING SIDE
Our agents on both sides	OFFICE DOUBLE ENDER
Same agent on both sides	AGENT DOUBLE ENDER

Double-Click a row to edit

INS NUM CAPS

3. You will be required to map expected types coming from TRANSACTIONDESK to their LONE WOLF counterparts (most of which are already assigned):
 - a. **Transaction Types (File Types in LONE WOLF):** You can choose from Transaction, Listing or Do Not Import.
 - b. **Contact Types:** You can choose from Buyer, Seller, Listing Agent, Selling Agent, Escrow Company, Mortgage Company, Title Company or Do Not Import.
 - c. **Transaction Statuses (Listing Statuses in LONE WOLF):** You can choose from Available, Cond Sale/Pending, Expired, Firm Sale/Pending, Off Market, Rented/Leased, Sold/Closed or Withdrawn.
 - d. **Property Types:** You can choose from Commercial or Residential.

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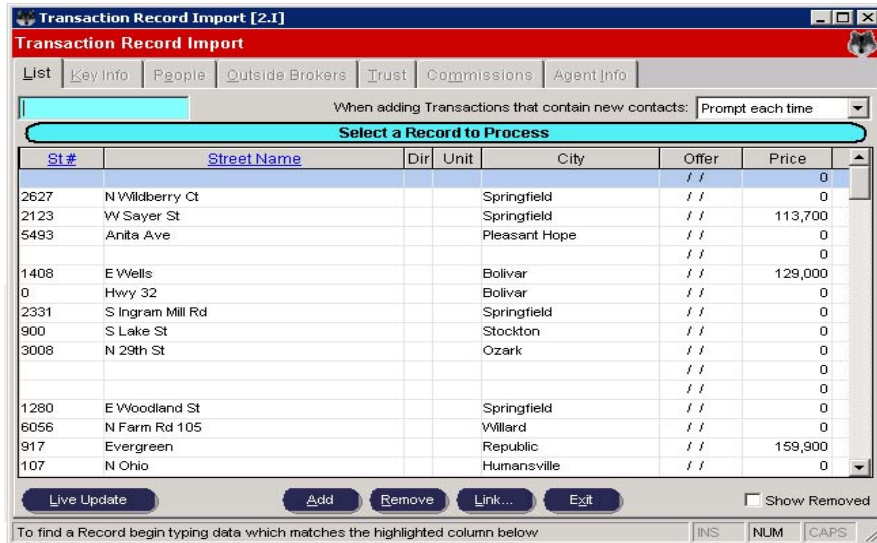
Double-Click a row to edit

INS NUM CAPS

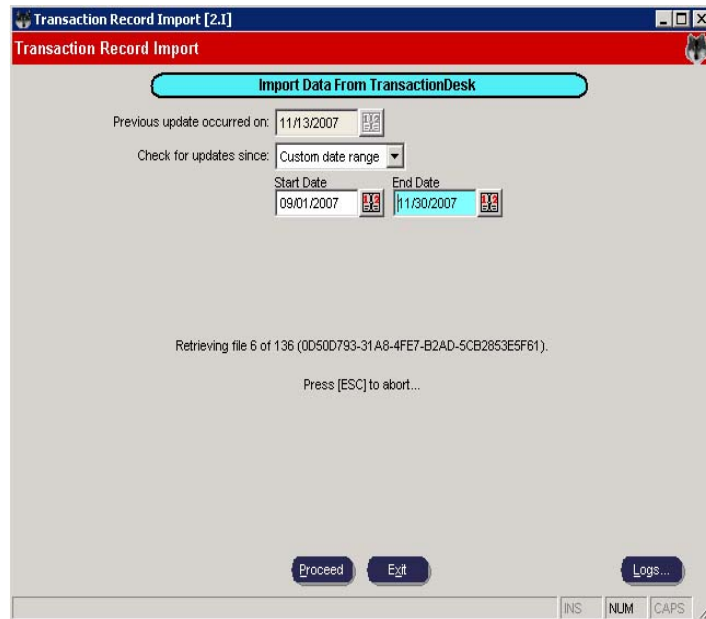
Now the integration should be ready for use, as described in the following pages.

How to use:

1. An import can be initiated from the Transaction Record Import interface [LONE WOLF shortcut 2.1] using the “Live Update” button on the button left corner of the screen below.

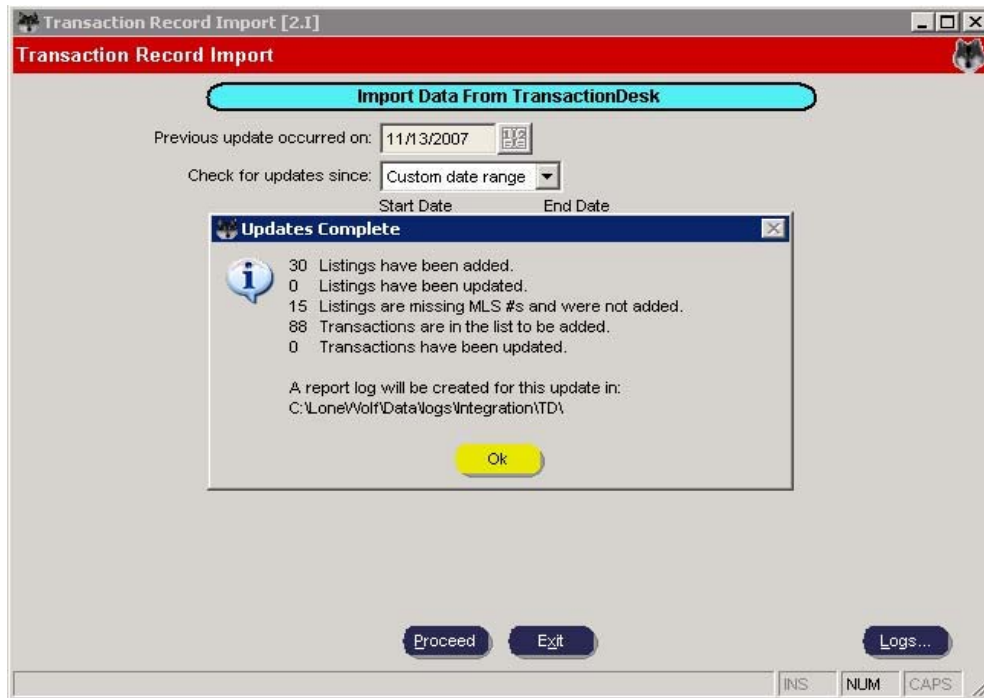


2. Once the import is started it may take a minute depending on the # of Transactions being imported. You should see the progress in the middle of the import window, as shown below.



3. Any unmapped pieces of data (Transaction Types, Contact Types, Property Types) that are found during the import will be prompted after the import is completed.

4. When the import is done you will see a report of what was imported and what was not. You can also find out more details on the result of the import by clicking on the “Logs” button.



1. Transactions are imported into 2 separate locations under these rules:
 - a. Listings can be found under the Property Listings interface [LONE WOLF shortcut 1.1] and must have a Listing # associated with it and that Listing # must be unique. Any Listing imported with a non-unique Listing # will simply update the existing Listing record with that Listing # instead.



- b. Transactions are found under the Transaction Record Import interface [LONE WOLF shortcut 2.] until they are processed (required data needs to be entered/selected, etc).

Transaction Record Import [2.1]

Transaction Record Import

List Key Info People Outside Brokers Trust Commissions Agent Info

When adding Transactions that contain new contacts: Prompt each time

Select a Record to Process

St #	Street Name	Dir	Unit	City	Offer	Price
					///	0
2627	N Wildberry Ct			Springfield	///	0
2123	W Sayer St			Springfield	///	113,700
5493	Anita Ave			Pleasant Hope	///	0
					///	0
1408	E Wells			Bolivar	///	129,000
0	Hwy 32			Bolivar	///	0
2331	S Ingram Mill Rd			Springfield	///	0
900	S Lake St			Stockton	///	0
3008	N 29th St			Ozark	///	0
					///	0
					///	0
1280	E Woodland St			Springfield	///	0
6056	N Farm Rd 105			Willard	///	0
917	Evergreen			Republic	///	159,900
107	N Ohio			Humansville	///	0

Live Update Add Remove Link... Exit Show Removed

To find a Record begin typing data which matches the highlighted column below INS NUM CAPS

For further information on importing TransactionDesk data into Lone Wolf please contact Lone Wolf support directly at support@lwolf.com or 1(866)279-9653.