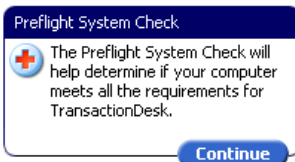
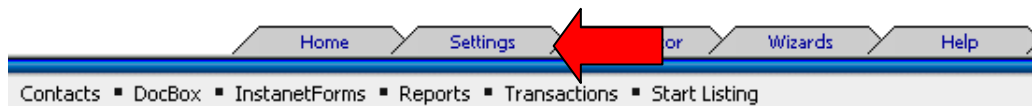




## Attaching a Document to a Listing-Super User Tip Sheet

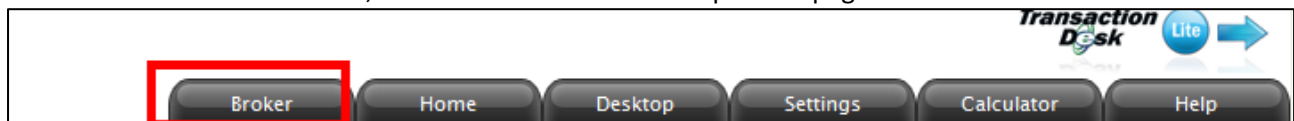
One great feature that is now included in Transaction Desk™ Instant Forms/Transaction Management is the ability to attach documents, such as disclosures, to your listings on Realcomp Online® so MLS subscribers can view them online eliminating the need for you to fax or e-mail them. In order to attach a document to any of your office's listings, the listing agent must first save a transaction in Transaction Desk™ associated with a particular MLS number. Also, you must have the Adobe Acrobat Reader version 7.0 or higher installed on your PC in order to upload documents to your agents' listings on Realcomp Online®.

**\*Note-** *To prevent from experiencing technical difficulties while trying to upload documents to your listings, there is a diagnostic check that you should perform in Transaction Desk™ prior to uploading documents, that will tell you if any programs on your PC may cause you to experience issues. The diagnostic check is called the "Pre-Flight System Check" and can be initiated by clicking the "Settings" tab at the top of Transaction Desk™ and **Continue** under "Pre-Flight System Check".*



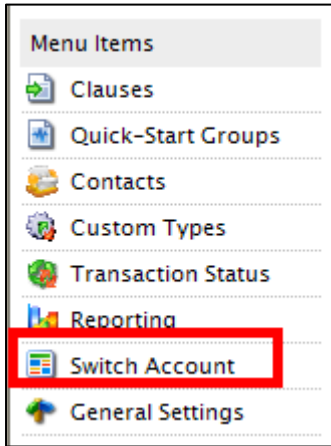
### TO ACCESS OTHER AGENTS' TRANSACTIONS IN ORDER TO UPLOAD DOCUMENTS TO THEIR LISTINGS

1. Log into your Transaction Desk™ account through the **Agent** menu on Realcomp Online® and click on **Transaction Desk-Forms**.
2. Once in Transaction Desk™, click on **Broker** tab at the top of the page.

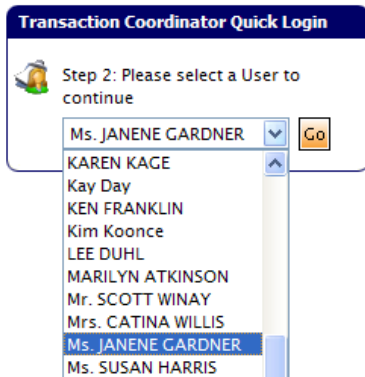




3. On the following screen click **Switch Account** in the left-hand side menu.



4. Select the agent you wish to upload documents for, and click **Go**.



You are now logged in as that agent just as they would be logged in through Realcomp *Online*®.

5. Click Transactions in the menu toward the top of the page. Click on the transaction you wish to upload documents to.





## ATTACHING DOCUMENTS TO THE TRANSACTION AND THE LISTING

**\*Note**-If the agent's transaction is not linked to the listing on Realcomp *Online*®, you will need to first attach the listing to the transaction. To attach the listing to the transaction open the transaction to view the Transaction Overview page. In the "I would like to:" drop-down list, select **Import Data** and click the arrow. Select "Import from Realcomp", the correct property type, and then enter the MLS number. Click **Import Data**.

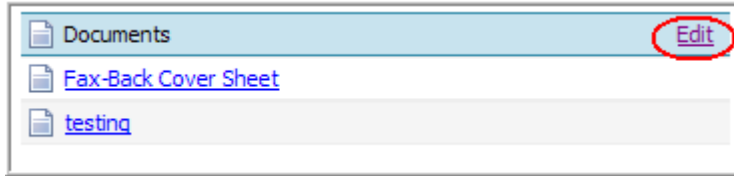
Please be patient as the import may take up to 30 seconds. Once the data is imported, you will be returned to your Transaction Overview page.

The screenshot shows a web interface with a dropdown menu titled "I would like to:". The menu is open, showing several options: "Print All Forms to a PDF", "Create a Fax-Back Cover Sheet", "Package Forms / Documents", "Generate a Transaction Profile Sheet (PDF)", "Import Data", and "Save As New Transaction Template". The "Import Data" option is highlighted with a red box. Below the dropdown, there is a form with fields for "Transaction Info", "Address:", "MLS Number:", "List Price:", "List Date:", "Expiration Date:", "Purchase Price:", "Acceptance Date:", and "Closing Date:". An "Edit" button is visible on the right side of the form.

The screenshot shows a web interface titled "Now Editing Transaction: 19748 ELKHART". Below the title is a section titled "Import Transaction Data". There are two radio buttons: "Import From Realcomp" (which is selected) and "Import from Transaction Template". Below the "Import From Realcomp" radio button, there are three fields: "Data Source:" with a dropdown menu set to "Realcomp MLS", "Property Type OR County:" with a dropdown menu set to "Residential", and "MLS # OR Property ID:" with a text input field. At the bottom right of the form, there are two buttons: "Import Data" and "Cancel".

**Step 1-Attach a Document to the Transaction in Transaction Desk™**

1. Click **Edit** in the Documents section of the transaction, from the Transaction Overview page.

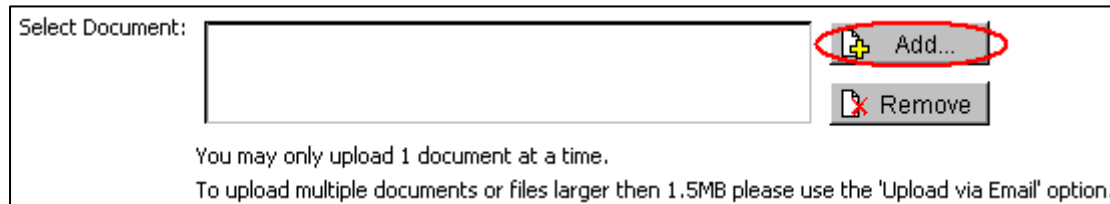


2. Click **Upload a Document** at the bottom of the page.

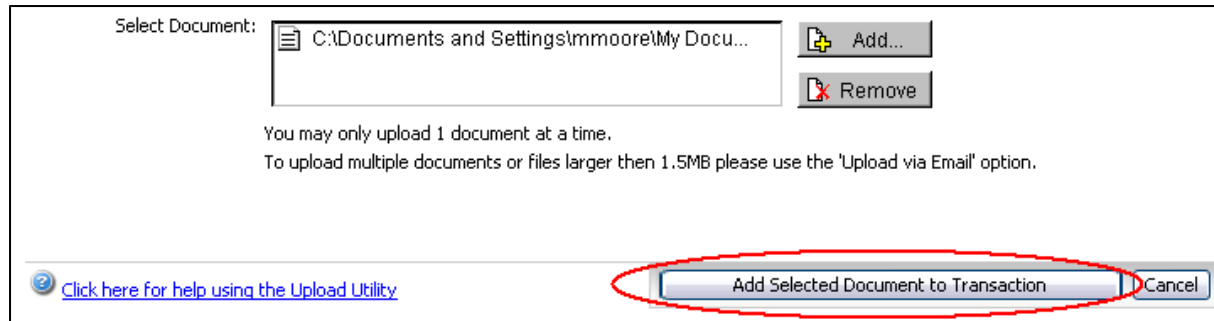


**\*Note**-The first time you upload a document to Transaction Desk™ you will be instructed to download a small utility program that is required for this functionality. Once it is installed, you will see the upload area as well as the **Add** and **Remove** buttons.

3. In the document upload utility, click **Add** twice. The familiar Windows browse box will open and you can then navigate to the location of the saved document. Double-click the desired file and it will be added to the upload area. You can only upload one file at a time.



4. Click **Add Selected Document to Transaction**. This will add the document to the transaction.



5.

Repeat these steps if you want to upload more than one document.



### Step 3-Attach the document to the listing

Check the box in front of the document(s) you wish to upload to the listing. Select **Add Selected Documents to my Listing** from the “I would like to:” drop-down list and then click **Go**.

The screenshot shows a web interface for selecting documents. At the top, there is a dropdown menu labeled "I would like to:" with the option "Add Selected Documents to my Listing" selected. To the right of the dropdown is a "Go" button. Below this, there is a table with two rows. The first row is a header with a checked checkbox, the text "Documents", and links for "Details" and "Download". The second row contains a checked checkbox, the text "(Copy of) [7857] - Michigan - Sellers Disclosure Statement", a magnifying glass icon, and a "Download Document" link.

Once you have attached the document, you will see a message indicating this and an icon will be added to the right of that document.

This screenshot is similar to the previous one but includes a red oval around the message "Documents successfully added to Listing." at the top left. The dropdown menu now shows "Add DocBox Documents" selected. In the second row of the table, the checkbox is unchecked, and a document icon has been added to the right of the "Download Document" link.

The presence of the document(s) should now be indicated on Realcomp *Online*® by a “D” on the summary reports and a **View Documents** link on the flyers.

Bed	Bath	Style	Sq Ft	
2	1	D	784	A M <b>D</b> <input type="checkbox"/>

AND



◀ **Property Photo** ▶

Click photograph to view all available photographs

Schedule a Showing **View Documents**