

## **QUICK TIPS to Start a Purchase Agreement using Transaction Desk**

1. Search the address or MLS number of the property
2. Click the MLS number to open the Listing information
3. Select "START TRANSACTION" on the Listing information
4. The screen will open into the "OVERVIEW" in Transaction Desk
5. Click the "WIZARD" and follow the steps filling in as much information for each page
  - a. STEP 5 will ask them to ADD FORMS
6. If "QUICK START GROUPS" have been added choose this option and select the group name of the forms.
7. Next choose "ADD SELECTED FORMS TO TRANSACTION" If no "QUICK START GROUP" was added- choose "INDIVIDUAL FORMS" and add the forms needed for the transaction then select "ADD SELECTED FORMS TO TRANSACTION"
8. When the screen refreshes-each form in the group will be there-no need to click any form unless they want to remove it for this transaction
9. SKIP STEP 6 until the transaction is saved
10. SKIP STEP 7 unless agent wants to share the transaction
11. SAVE the Transaction
12. When the screen refreshes-scroll down to "INSTANT FORMS" on the right
13. Click on each individual form to fill out what's missing
  - a. **HINT: (to maximize the screen view-select the red dash above PRINT FORMS on the window pane on the right**
14. To Email-Print or Fax- Choose options on the window pane on the right
15. PRINT the "FAX BACK COVER SHEET" to add any documents back into the transaction for storage