

QUICK TIPS

How to Start a LISTING using Transaction Desk

- 1) Click "PUBLIC RECORDS" tab and select "PRD COUNTY SEARCH"
- 2) Choose county and type in address & street name of property you are listing
- 3) Select "COUNT" (if you have a record) click "SEARCH"
- 4) Click the "PROPERTY I.D. NUMBER" (this will open the full record of the property)
- 5) Click "START LISTING INPUT FORM" (the screen will open to Transaction Desk and confirm the address)
- 6) Click the down arrow on "SELECT PROPERTY TYPE" and pick the profile form for the address
- 7) Click "START LISTING"
- 8) The screen will open to a Profile Form with location information pre-filled on the form
HINT: (to maximize the screen view-select the red dash above PRINT FORMS on the window pane on the right)
- 9) Continue to fill out information about the property
- 10) Choose to PRINT-EMAIL or FAX form to client
- 11) To input the form to REALCOMP for entry- CLICK "SUBMIT TO REALCOMP"
- 12) If all required information is entered the screen will refresh and provide an MLS number on the form. If information is missing a pop-up screen will appear with the missing fields. Continue to fill out and choose "SUBMIT TO REALCOMP" again until an MLS number is provided

How to Add Additional Forms to any EXISTING Transaction

- 1) Click on the gray "HOME" tab
- 2) Choose "WORK WITH AN EXISTING TRANSACTION" Or "TRANSACTIONS"
- 3) Click on the link of the address- which will open to the "OVERVIEW "page

- 4) Click on the "WIZARD" and follow each step- STEP 5 will suggest to ADD FORMS
- 5) If "QUICK START GROUPS" have been added choose this option and select the group name of the forms
- 6) Next choose "ADD SELECTED FORMS TO TRANSATION" 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"
- 7) When the screen refreshes-each form in the group will be there(no need to click any form unless wanting to remove it for this transaction)
- 8) SKIP STEP 6 until the transaction is saved
- 9) SKIP STEP 7 unless agent wants to share the transaction
- 10) SAVE the Transaction
- 11) When the screen refreshes-scroll down to "INSTANET FORMS" on the right
- 12) Click on each individual form to fill out what's missing (to maximize the screen-select the red dash above PRINT FORMS on the window pane on the right)
- 13) To Email-Print or Fax- Choose options on the window pane on the right
- 14) PRINT the "FAX BACK COVER SHEET" to use and add any documents back into the transaction for storage