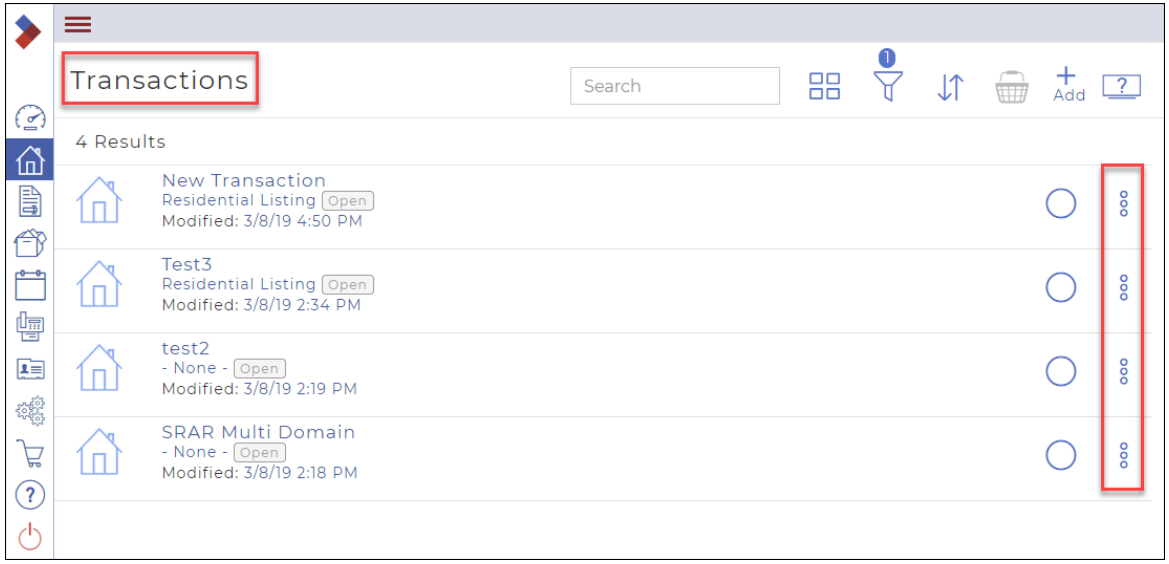
Transactions

Transactions (formerly referred to as Transaction Kits) is the list of your transactions, or the transactions that are shared with you. Transactions are a way for you to group and manage all the forms you need for a specific file—whether it is a group of listing documents or sale documents.

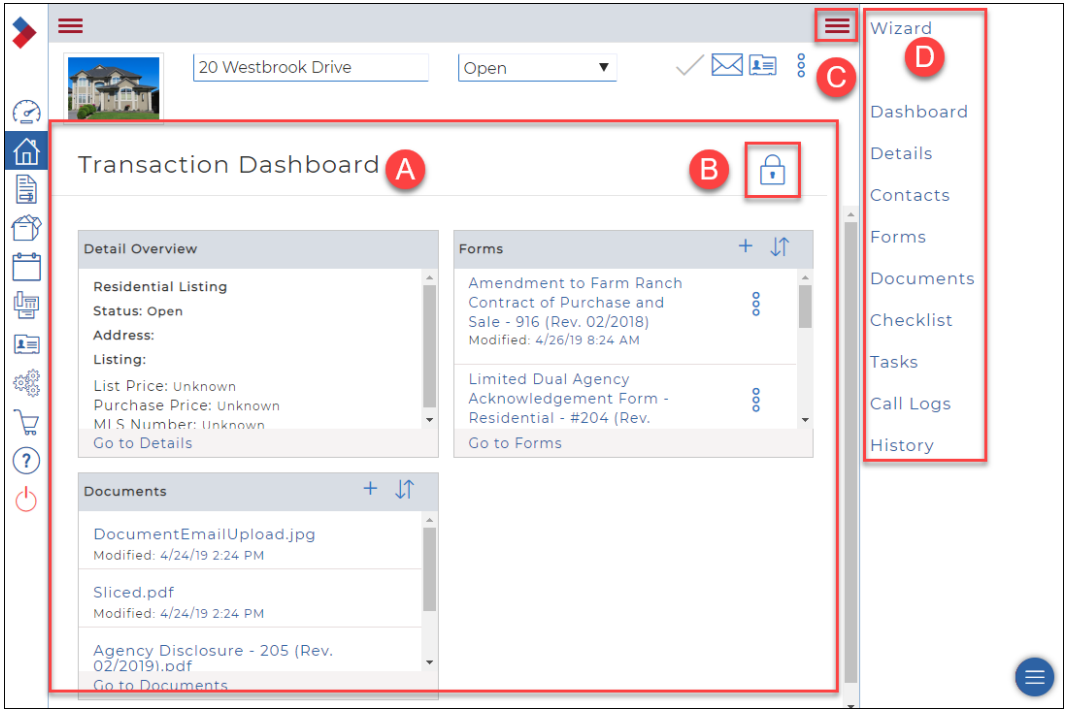


Here, you can view transactions and their status, or you can create new transactions by clicking **+Add .**

When you see a transaction in the list, you will see the name of the transaction and its status, and the last modified date.

You can also view the details of a transaction, such as the contacts, forms, documents, checklist, tasks, or signings, and you can also see the history of a transaction, all from the **More Options** menu to the right of the transaction names.

When you click the name of a transaction, the **Transaction Dashboard** displays.



A. Transaction Dashboard
The Transaction Dashboard displays the details for a specific Transaction. It is fully customizable by using widgets.

B. Dashboard Lock
To customize your dashboard, click the **Lock** icon to unlock it. You can then drag and drop, resize, or delete widgets from your dashboard. Click the **Lock** icon again to relock your dashboard.

C. Right Menu Toggle
You can open and close the right menu using this toggle.

D. Right Menu
This menu displays links to different steps of the Transaction Wizard and other actions.

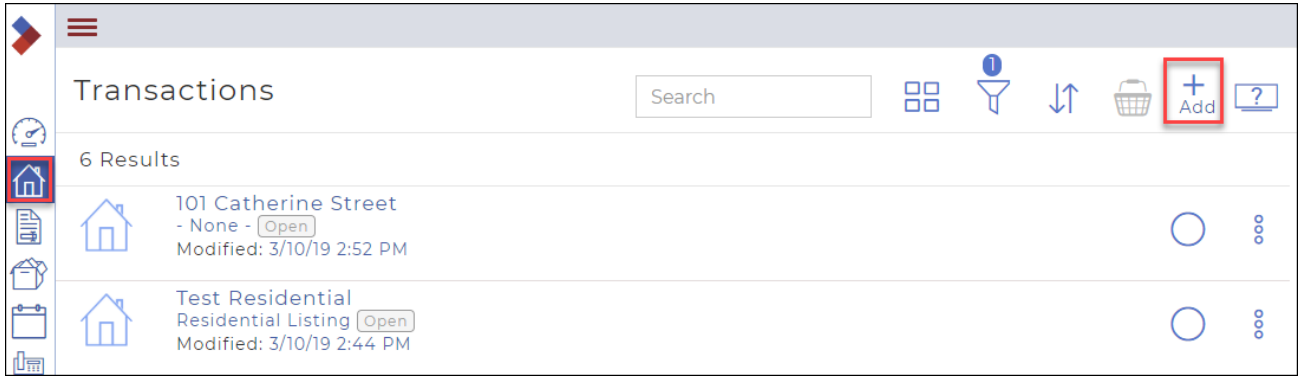
Creating a Transaction

You can use a transaction to represent any interaction with a client, from a new listing to the completion of a sale.

You can add a transaction manually, where you manually provide all the transaction information. You can also use an MLS® System listing to automatically populate some of the fields in the transaction, decreasing the time it takes to fill in the forms.

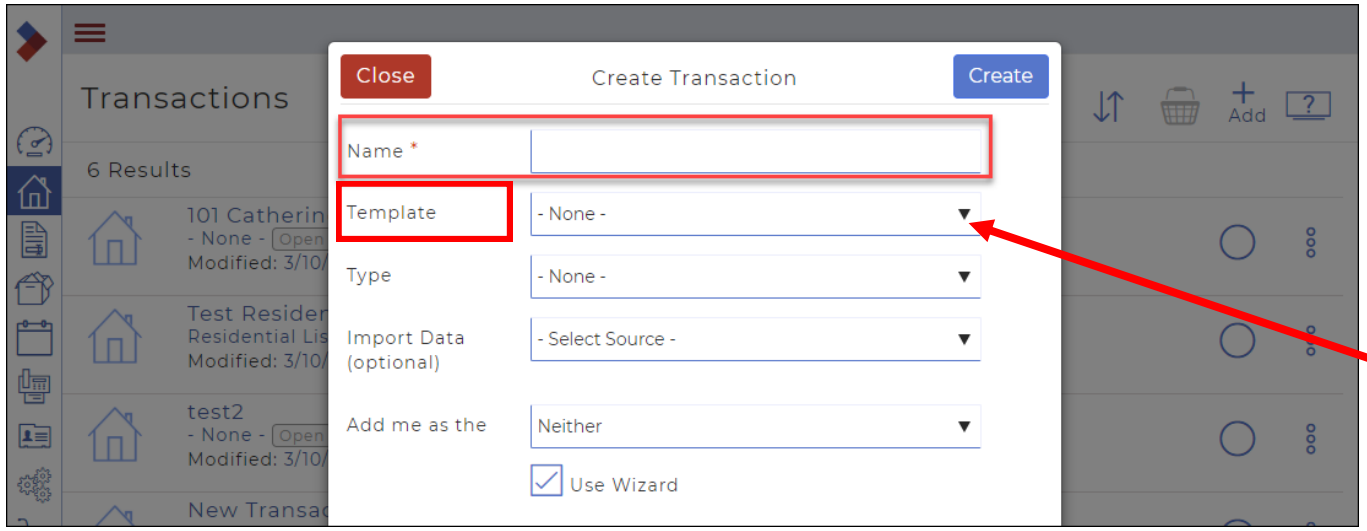
To create a transaction:

1. Click **Transactions** in the Sidebar. Your **Transactions** display.



2. Click **Add**. The **Create Transaction** dialog box displays.

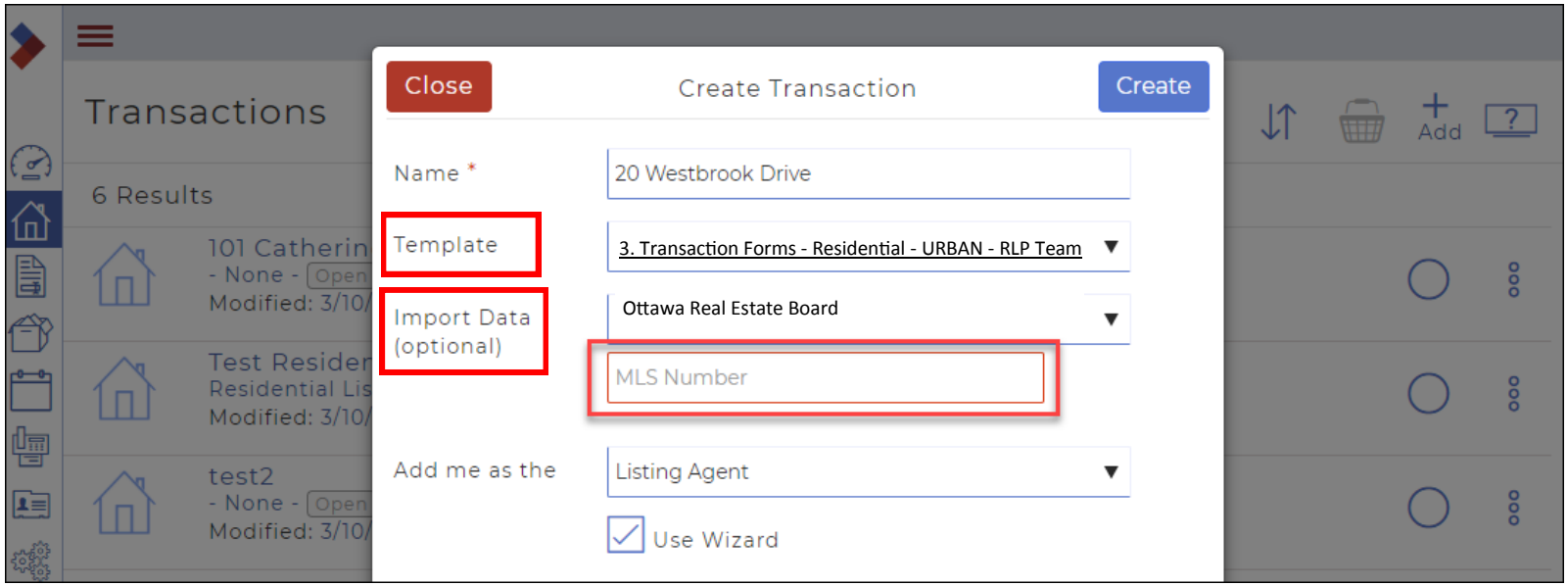
   Note: Required fields are indicated with an asterisk*.



3. Enter a **Name** for the transaction. Each transaction requires a unique name.
4. Use the **Template** dropdown to select the appropriate template to automatically add a checklist, forms, and documents.

Our Brokerage has full Templates for residential listings and transactions—which include all the forms required...and clauses within the

5. Use the **Import Data** dropdown to select “Ottawa”. MLS® Number field displays.



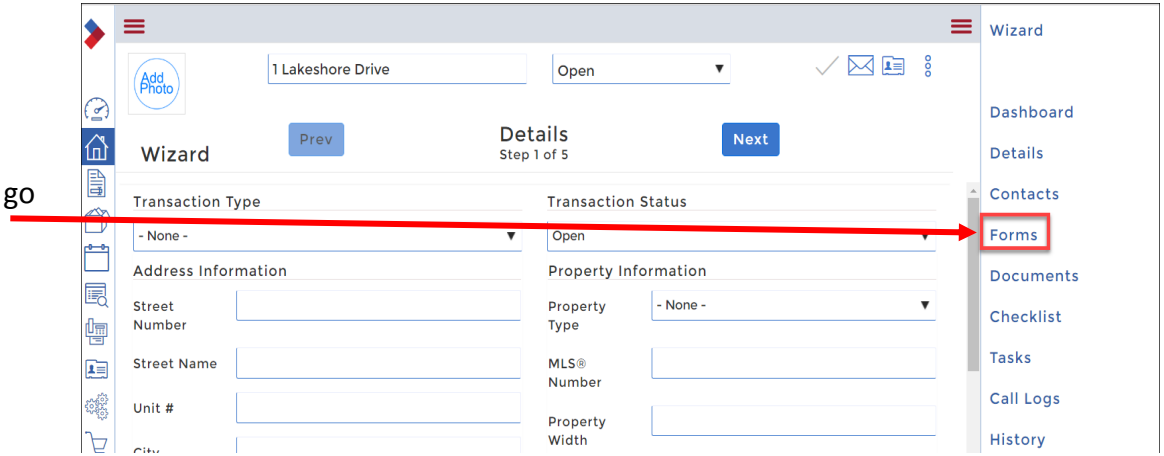
6. In the **MLS Number** field, enter the MLS® number of the listing.
7. Use the ***Add me as the*** dropdown to select your role in the transaction. Choose from Listing Agent, Selling Agent, Neither, or Both.

You may automatically be added, depending on your settings.

8. Click **Create**.

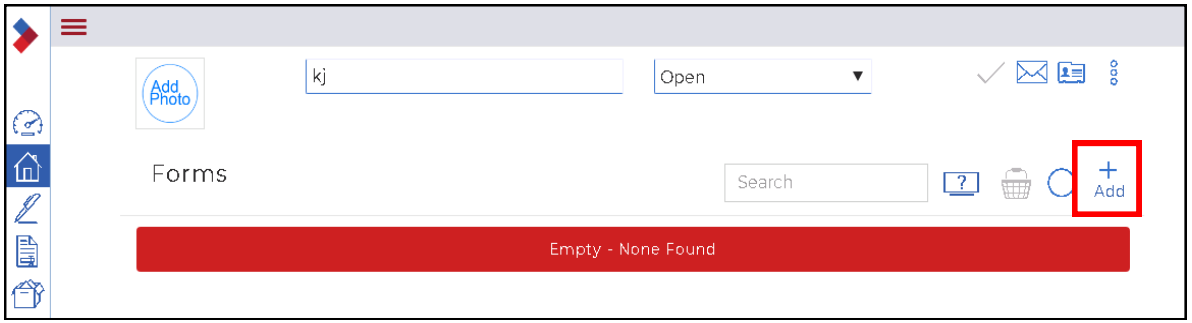
The Wizard window displays **Details: Step 1 of 5.** You can now use the 5-step Transaction Wizard to edit your transaction. Some of the listing information is populated automatically from the MLS® System listing.

If you prefer not to use the Wizard, you can skip it and go directly to the forms.

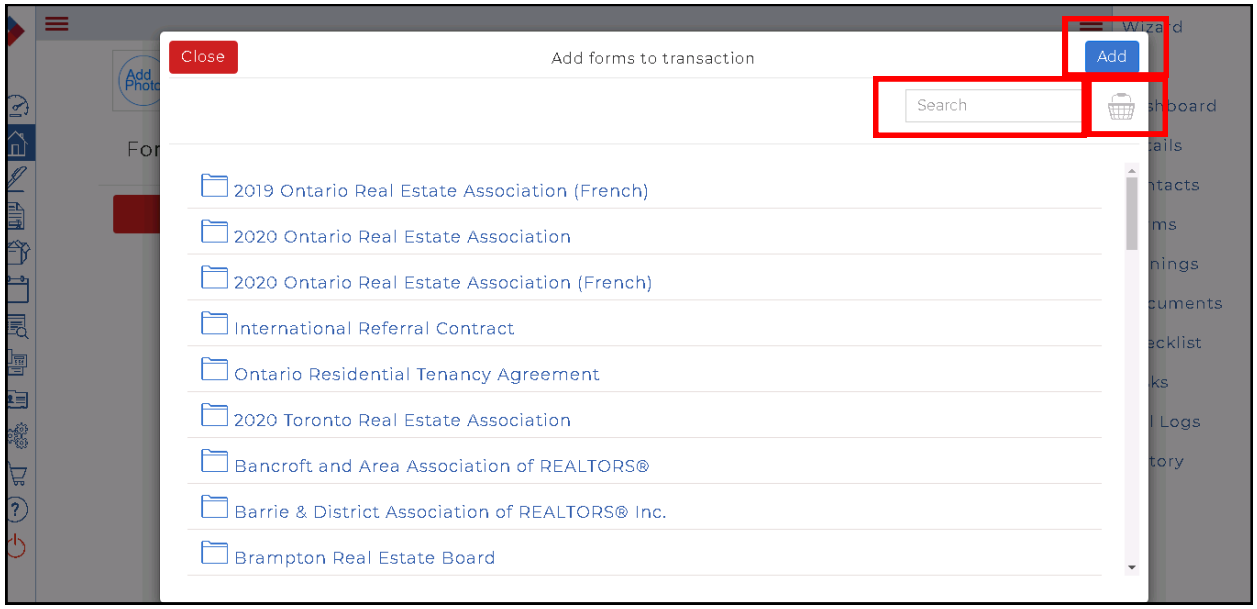


TO ADD FORMS TO A TRANSACTION:

1. Click Add +



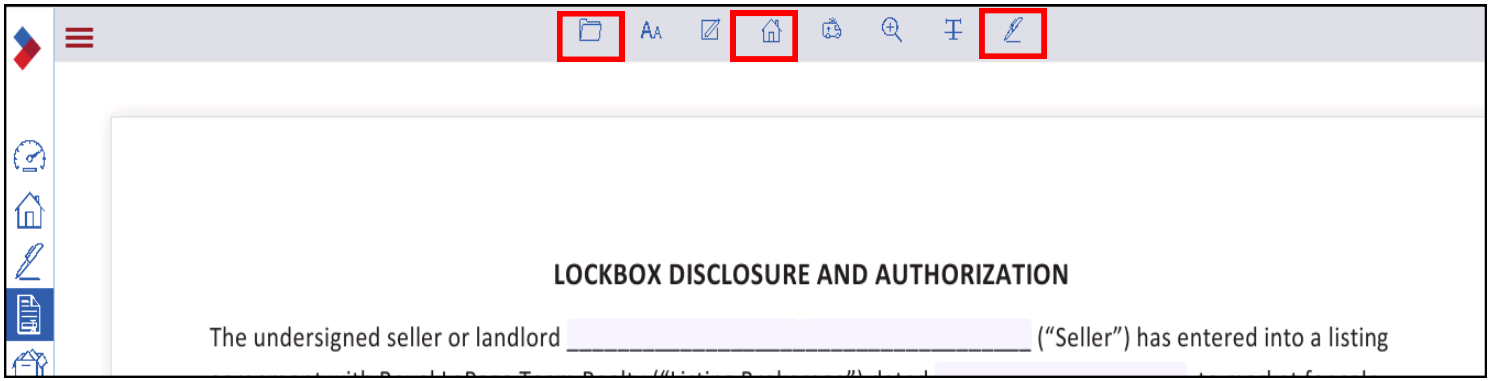
2. Either type the name or number of the form in the “Search” box…. Or scroll through the list to find 2020 Ontario Real Estate Association forms — or at the bottom of the list, Royal LePage Team Realty forms.
3. When you find the form that you want, select it by putting a checkmark in the circle to the right, you will see the number of forms increase in the basket as you select them.
4. Once you have selected all the forms you want, click Add.



Navigating through forms:

To move from one form to another, select the house icon at the top of the page.

To save or print, select the file icon, and choose from the drop down list.



If you want to send one form to an eSignature provider (that you have previously linked to your WebForms account) - use the Pen icon at the top of the page.

If you want to send several forms to an eSignature provider at the same time, exit this menu (file folder icon, drop down, exit) - this will take you to the list of forms within your transaction. Select the ones that you want to take an action with by putting a checkmark in the circle beside the forms. Then click on the basket icon and options will appear that will action all selected forms at the same time.