

# How to move your existing transactions from zipForms® to TransactionDesk®

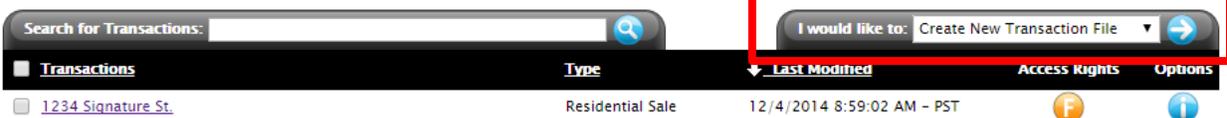


## **PART 1: Let's start with creating a transaction in TransactionDesk®**

You can email as many documents as you like into TransactionDesk® directly from zipForms®!

1. Log into TransactionDesk® and click on the **Transactions** button.
2. Then find the field on the right side, next to **"I would like to:"** Make sure the field says **Create New Transaction File**, and click the arrow in the blue circle. (*shown below*)

### Transactions



3. Fill in **Transaction Name**, choose **Transaction Type**, Choose **GLVAR MLS** for Data Source, Choose the property type, Enter the MLS number or Parcel ID and if you don't know either one you can use the address search by clicking the **"If you are importing from tax records and don't know the parcel id, please click here to search,"** now choose which type of agent you are; Listing, Selling, Both or Neither and click **Save**.

4. Fill in the Transaction Details page and click the **Save** Icon.

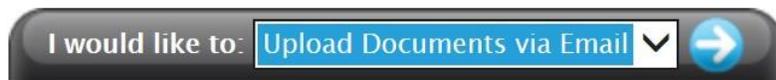
***That's it! You've created a Transaction in TransactionDesk®!***

## **PART 2: Now, let's get those files out of zipForm®s and into TransactionDesk®**

1. We are starting in TransactionDesk®, by emailing your zipForm® documents directly into the transaction file. Open the transaction you created a moment ago by clicking the Transaction button, then clicking the name of the transaction

2. Now click the **Documents** tab.

3. On the next page make sure the field next to the **"I would like to:"** command is set to **"Upload Documents via Email,"** and click the blue arrow.



4. Now you have a choice to either pick: **"Click to open email client, attach documents and send ,"** OR **"Click to save Transaction email contact to your device."**

### Transaction - Document List



There's no right decision here, go with whichever works! The point of this is to acquire/save the email address into the Transaction folder. In this example, first click **“Click to save Transaction email contact to your device,”** then **Open** in the message that appears at the bottom of the Internet window.

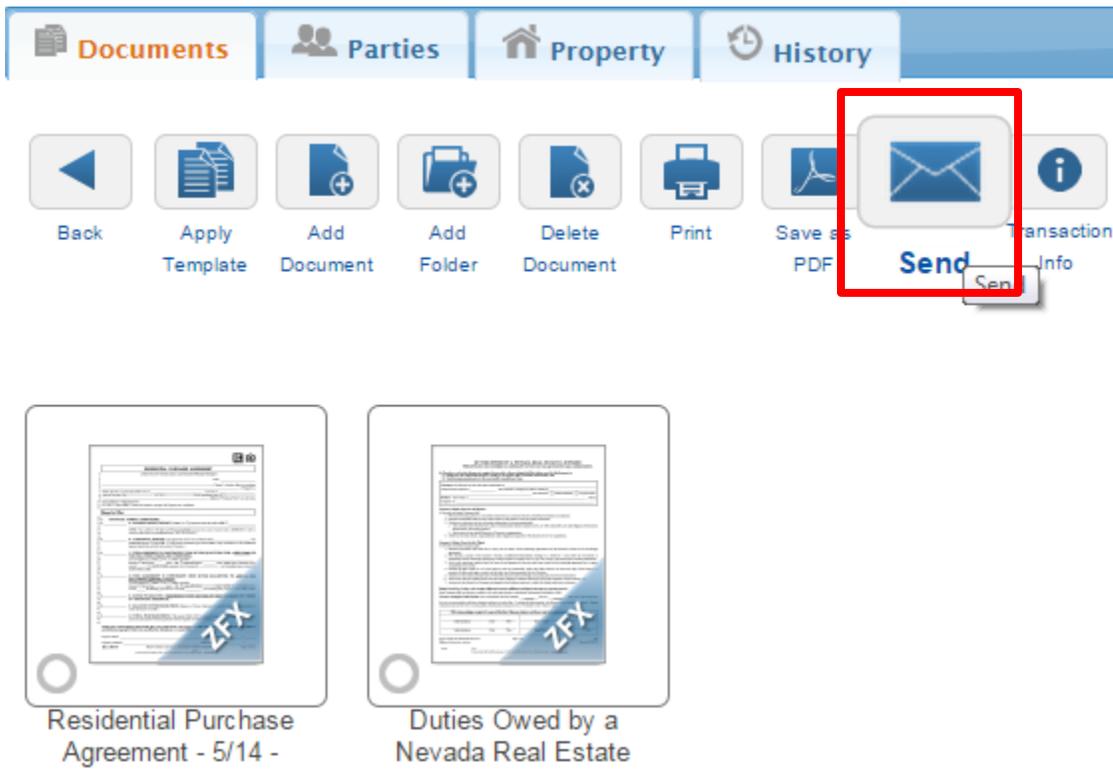


5. Now **copy the email address** that comes up in your email program's address book.



6. Now it's time to go back to zipForm<sup>®</sup>s. Click the transaction you would like to move the documents from and into TransactionDesk<sup>®</sup>.

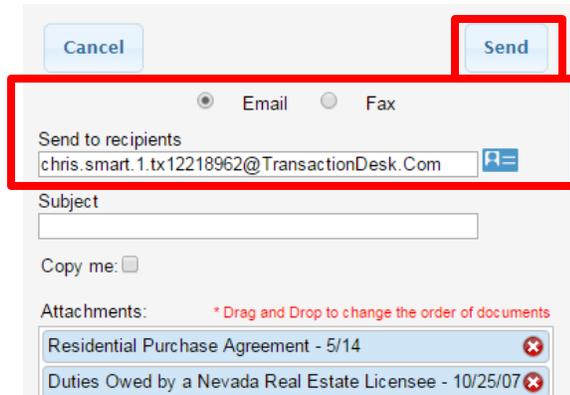
7. Click the **Send** button (It looks like an envelope).



8. Click the **Select All** button.



9. Now paste the copied email address into the **Send to Recipients** field, and click the **Send** button.



**Your documents will now show inside the matching Transaction folder you created in TransactionDesk®!**

### Transaction - Document List

Documents	Authentisign™	I would like to:			
Details	Contacts	Forms			
Documents	Authentisign™	Upload Documents			
Documents - Viewing Transaction: 1234 Signature St.					
Missing Signers	Order	Status			
Download	Options				
<input type="checkbox"/>	Fax-Back Cover Sheet	1	↓		
<input type="checkbox"/>	Email: -	2	↑ ↓		
<input type="checkbox"/>	Residential_Purchase_Agreement_-_514_ts35996.pdf	3	↑ ↓		
<input type="checkbox"/>	Duties_Owed_by_a_Nevada_Real_Estate_Licensee_-_102507_ts37559.pdf	4	↑ ↓		
<input type="checkbox"/>	zipFormPlus.jpg	5	↑		
= Incomplete Document					
				<a href="#">Update Order</a>	