## **Sharing Transactions**

TransactionDesk allows you to create Share groups which can be used to share transactions with other people in your office. Permissions allow you to grant Read, Write, or Full Access to your transaction. This is an easy way to coordinate a transaction among team members.

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To setup a Share Group:

In TransactionDesk, select **Setup** from the left hand menu and then choose **Sharing**.

	Transaction Templat	
ණිඩු SETUP	Sharing	
? SUPPORT	Third Party Settings	
	Service Providers	

On the **Sharing Groups** page, click the **Add** button.

In the **Create** dialogue, give the Share Group a descriptive name and click **Save**.

Close	Create	Save
Name *	Team Test Share	

On the next screen, you will select the Share Members. Click the name of the person you want to include in the Share Group and click the right pointing arrow to assign them Privileges.

Set member share	
Available Members	Read Only Privilege
#8999 Z-TRAINING AGT	
#9000 2-TRAINING AGT Arielle Percival	$\Theta$
Brokermint Brokermint CDR Bus. Solutions CDR Bus. Solutions	
Clareity Test	Write Privilege
Consolidated Knowledge	$\ominus$
Edward Chovgan GabrielTechSol GabrielTechSol	$\bigcirc$
homejunctioninc homejunctioninc	-
housecanary housecanary Instanet TransactionDesk	Full Privilege
Joanne Day	

## **Privileges are:**

**Read Only** – allows the member to view the transaction only.

Write – allows the member to modify forms, but not delete anything.

**Full** – allows the member full access to the transaction.

Once you have assigned all the members to their privileges, click the **Update** button.

Your Share Group is setup and ready to use.

## Assigning a Share Group to a Transaction:

From the TransactionDesk Dashboard, select the name of the transaction you wish to share. When you are at the TransactionDashboard, click the three circle menu and select **Share**. (*Tip: When you are creating a new transaction, in the wizard, you can do this from the Details step as well.*)

Update

123 W Main St - Sha	ring Example	Menu
Prev	Details Step 1 of 5	Share Notes Duplicate

Select the name of the Share Group(s) you want to share the transaction with and click the right arrow. Once the groups are all included, you can select to notify the members as well as include an optional message. Click **Save**. Group members will be able to see the shared transaction(s) in their transaction dashboard.

Close	Sharing	Save		
Test Share	Add 🔿			
	e			
	~	-		
Notify assigned users of this share				
Optional message				