Transaction Desk Basics

Navigation Menu (Left Side)

The options on the left side are for **Transaction Desk as a whole**. Clicking these options will show **all files and transactions**, not just the transaction you are currently working in.

Home / Transactions

- Click the **house icon** to return to your Transactions (Home) page.
- This is where all of your transaction files are stored.

Opening an Existing Transaction

- Click on the transaction name to open and access that file.

Creating a New Transaction

1. Click **+ Add**
2. Enter the transaction title.
3. Select the appropriate template:
4. Goodwood Realty Buyer
5. Goodwood Realty Seller
6. Import data from MLS if applicable.
7. Click Save/Create.

Working Inside a Transaction

Once you have opened a transaction, use the options on the right side to manage that specific file.

Details

Contains the transaction information, including:

- Property address
- MLS number
- Important dates
- Purchase price
- Financing information
- Other transaction-specific details

Contacts

Add and manage contacts associated with the transaction, including:

- Buyers
- Sellers
- Cooperating Agent
- Lender
- Title Company
- Inspectors
- Other vendors

Forms

Contains all current GBRAR and LREC forms that are available to complete and/or send for signatures.

Helpful Tip:

- While inside a form, click **Clauses**.
- Select **Office Clauses** to insert commonly used Goodwood Realty clauses as needed.

Signings

Used to send documents for electronic signatures through Authentisign. *See Authentisign Basics for more info*

Docs

Stores all documents associated with the transaction.

This is where:

- Signed documents automatically appear after signing is complete.
- Additional documents can be uploaded.
- Documents can be imported into the transaction.

Checklist

Used for compliance review.

- Upload all final signed documents to the appropriate checklist item.
- Once uploaded, documents are automatically submitted for compliance review.
- If a document is rejected, you will receive an email notification explaining the reason.
- To correct the issue:
- Click the three dots beside the rejected item.
- Select **Upload Revision**.
- Upload the corrected document.

Tasks

Used to track important milestones, deadlines, and reminders.

Examples:

- Deposit Due
- Due Diligence Deadline
- Inspection Response Deadline
- Appraisal Ordered
- Appraisal Cleared
- Order WDIR
- Order Home Warranty
- Verify Utilities
- Schedule Closing
- Post-Closing Follow-Up