BrokerTOOLS

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Transaction Transfer in Broker Tools

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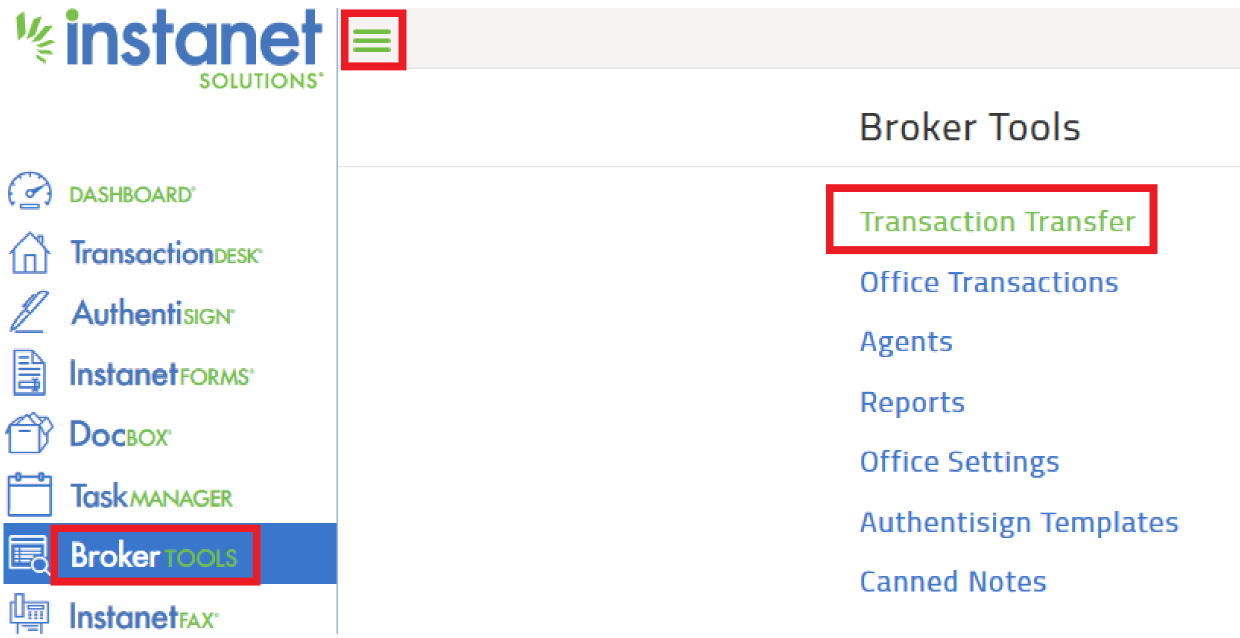
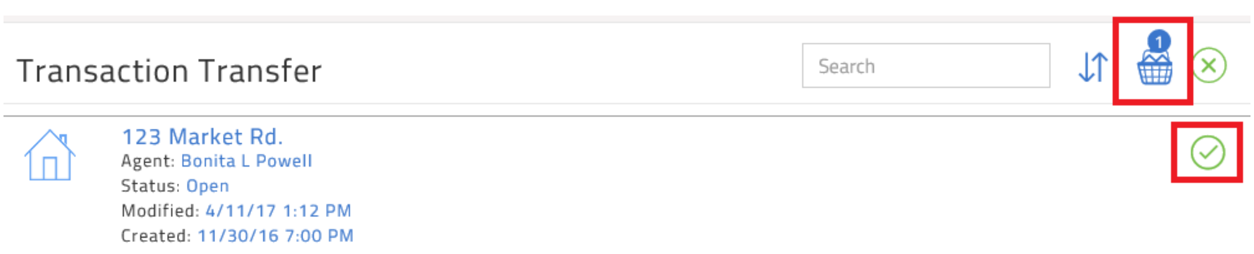
Transaction Transfer in Broker Tools

When an agent leaves your office and your association/MLS has the "transaction transfer" feature turned on, all the files that were created under that agent will be transferred to the super user of the office they just came from. As a super user you may want to transfer the transactions you received to another agent, to yourself or back to the previous agent

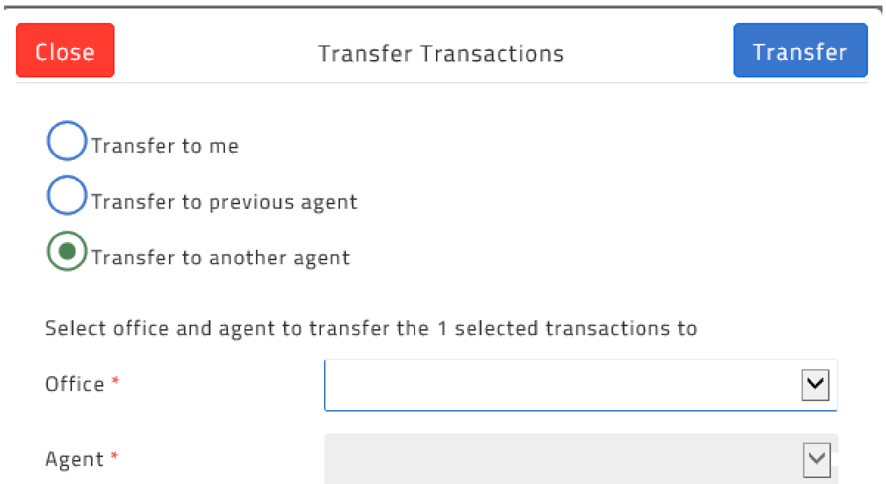
To get started log into your TD account and go to broker tools – transaction transfer. If you need to you can hit the hamburger button in the top left hand corner to expand the left hand menu.



Once you click Transaction Transfer it will re-direct you to a screen that shows all the transactions that have been transferred to you. It will show the name of the agent they came from. To transfer the transaction back to that agent just check off the transaction and hit the basket icon. (Note: if you have a lot of transaction in here you can search by the agent name in the search box so you only get there transactions on the screen to transfer back)



Once you hit the basket icon you are presented with three options.
--First option lets you transfer the transaction to your own personal transaction list.
--Second option allows you to transfer it to the agent that it used to belong too.
--Third option is to transfer it to someone else in your office. Use the first dropdown to select the office (if you are attached to more than one) then the second drop down to select the agent to transfer it to. Once you have made your option hit transfer to complete the task.



Once you hit transfer the transaction will no longer be on your list and will now reside under the option you chose.