

Email 1: Brokers

Subject: Transaction Transfers: Coming soon to TransactionDesk

Preheader: The Who, What, When, Why and How that you—and your agents—need to know

Header: Changes are coming to TransactionDesk when an agent transfers to another brokerage

Who is affected?

All brokerages and their agents that use Lone Wolf Transactions (TransactionDesk Edition) as a member benefit through Central New York Information Service, Inc. (CNYIS), Upstate New York Real Estate Information Services LLC (UNYREIS), Western New York Real Estate Information Services, LLC. (WNYREIS), Chautauqua-Cattaraugus BOR, Cortland County BOR, Jefferson-Lewis BOR, McKean County AOR and Mohawk Valley AOR.

What is happening?

Currently, if an agent leaves a brokerage to join another brokerage, all transactions are transferred over to the new brokerage with no copies left with the originating brokerage. Soon, whenever an agent moves to a new brokerage, transactions will stay with the originating brokerage. There is nothing that the brokerage needs to do as this change will happen automatically.

When is it happening?

This new process will go into effect on July 11, 2023.

Why is it happening?

Lone Wolf knows compliance and accountability can be stressful for real estate brokerages, so together with your MLS, we are introducing this feature, that also protects the brokerage in the event of an audit.

How does it affect agents?

Departing agents will receive PDF copies of the transactions.

If your office has the **Enable Transaction Transfer** setting set to **Yes** (which will be the default setting effective on July 11, 2023), then when an agent leaves a brokerage to go to another, the transactions that were created while at the prior brokerage are automatically transferred to the “super user” (which is usually the DR) for that firm/branch. When transaction(s) are transferred, the agent will automatically receive an email from TransactionDesk which will include a list of all transactions that have been moved, and a link to each one.

The links enable the agent to download a PDF of each transaction including any attached documents. The agent can save the PDF to a location to access in the future if desired. The PDF file name will have the same as the transaction name in TransactionDesk.

How Can the SuperUser Transfer the Transaction(s) to Someone Else or Back to the Agent?

When transactions default to the super user, the broker can choose to transfer an agent's transactions as follows:

- To themselves
- To another agent in their office
- To the original agent

[Learn more here.](#)

Please don't hesitate to reach out to Lone Wolf Support at support@lwolf.com with any questions.

Lone Wolf Real Estate Technologies

Email 2: Agents

Subject: Transaction Transfers: Coming soon to TransactionDesk

Preheader: The Who, What, When, Why and How that you need to know

Header: Changes are coming to TransactionDesk when an agent transfers to another brokerage.

Who is affected?

All brokerages and their agents that use Lone Wolf Transactions (TransactionDesk Edition) as a member benefit through Central New York Information Service, Inc. (CNYIS), Upstate New York Real Estate Information Services LLC (UNYREIS), Western New York Real Estate Information Services, LLC. (WNYREIS), Chautauqua-Cattaraugus BOR, Cortland County BOR, Jefferson-Lewis BOR, McKean County AOR and Mohawk Valley AOR.

What is happening?

Soon, whenever an agent moves to a new brokerage, transactions will stay with the originating brokerage in TransactionDesk. There is nothing that the agent needs to do as this change will happen automatically.

When is it happening?

This new process will go into effect on July 11, 2023.

Why is it happening?

Lone Wolf knows compliance and accountability can be stressful for real estate brokerages and their agents, so together with your MLS, we are introducing this feature, that also protects the brokerage in the event of an audit.

How does it affect agents?

This means that when agents move to a new brokerage, the transactions associated with their prior brokerage will stay put—but that doesn't mean the transactions are gone forever! It just means they will no longer automatically transfer with the agent.

If your office has the **Enable Transaction Transfer** setting set to **Yes** (which will be the default setting effective on July 11, 2023), then when an agent leaves a brokerage to go to another, the transactions that were created while at the prior brokerage are automatically transferred to the “super user” (which is usually the DR) for that firm/branch. When transaction(s) are transferred, the agent will automatically receive an email from TransactionDesk which will include a list of all transactions that have been moved, and a link to each one.

The links enable the agent to download a PDF of each transaction including any attached documents. The agent can save the PDF to a location to access in the future if desired. The PDF file name will have the same as the transaction name in TransactionDesk.

Please don't hesitate to reach out to Lone Wolf Support at support@lwolf.com with any questions.

Lone Wolf Real Estate Technologies