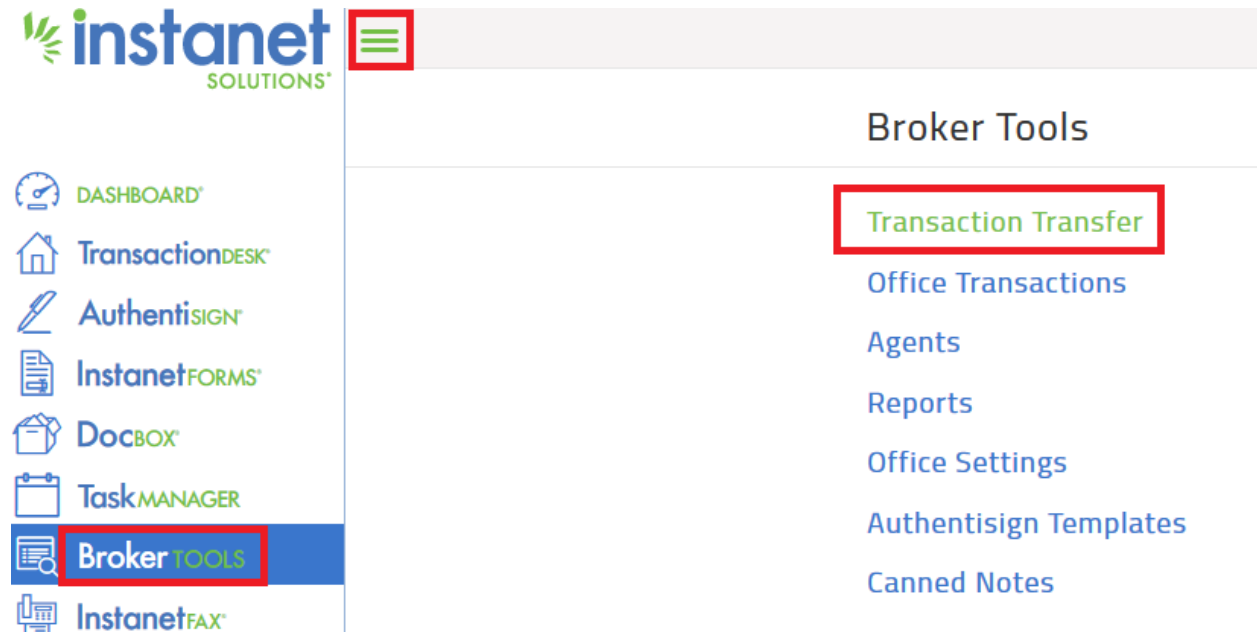# TransactionDesk: Transaction Transfer in Broker Tools

When an agent leaves your office, all the files that were created under that agent will be transferred to the 'Super-User' (usually the Designated REALTOR®) 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.
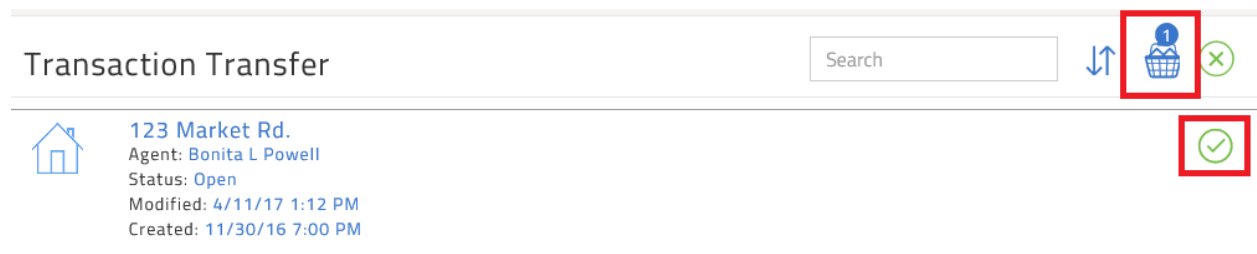
To get started, log into your TransactionDesk account and go to **Broker Tools – Transaction Transfer.** If you need to, you can hit the hamburger button in the top left-hand corner to expand the left-hand menu.

Once you click **Transaction Transfer,** it will re-direct you to a screen that shows all the transactions that have been transferred to you and the name of the agent they came from.

To transfer a transaction(s) back to that agent, just check off the transaction(s) and then hit the basket icon.

Note: if you have a lot of transactions in here, you can search by the agent name in the search box to see only their transactions on the screen to transfer back.

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Once you click on the basket icon, you are presented with three options.

-- **Transfer to me**: lets you transfer the transaction to your own personal transaction list.

-- **Transfer to previous agent**: allows you to transfer it to the agent that it used to belong to.

-- **Transfer to another agent**: is used 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 selected your option, click on **Transfer** to complete the task.

Note: After you transfer a transaction, it will no longer be on your Transfer Transactions list and will now reside under the option you chose.

FAQ's:

TransactionDesk: Transaction Transfer in Broker Tools

1. **How does this work?**
   - **For the agent –**
     - The system will automatically generate an email when your transfer is processed by LoneWolf/Instanet.
     - This email will confirm that the system is aware of your move, and will inform you to whom in your previous office your transactions have been transferred.
     - The email will contain a list of the transactions and each transaction name will be hyperlinked to the archived PDF of each transaction.

   - **For the previous Broker/Super-User**
     - The Broker in your previous office will also receive an email, informing them that the transactions have been transferred to them. They will receive instructions as to how to reassign the transactions to others in their office, or back to you if they wish to do so.
     - If the Broker does reassign the transfer to another person in the office, that person will also receive an email notifying them that the transaction has been transferred to them.

2. **What happens to transactions when someone doesn't transfer but becomes inactive (no longer a subscriber)?**
   a. The Super-User (usually the DR) has access to their transactions just like they always did and they just stay where they are.

3. **Are all transactions that belonged to prior brokerage transferred and not just open or incomplete transactions?**
   a. Yes, all the transactions will be transferred as they belong to the prior brokerage.

4. **What if the SuperUser does nothing?**
   a. Then the transactions will just sit in their account.

5. **What if the DR is not the person who should be getting the transferred listings? (ex. the DR may want the branch manager or an admin to handle this)**
   a. First, if there is more than one super user in the office it will go to the super user with the oldest account (usually the DR) or if there is a primary super user it will go to them. If your brokerage would like to designate someone who is not the DR as the primary Super-User (please note, this person must have a TD account), the DR should contact the local Association and they can have LoneWolf flag whoever should be the primary Super-User so it will always go to them.

Still have questions? Please contact support@lwolf.com or your local Association staff for more answers.

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