Transaction Coordinator Master Settings for Agent

You can send a transaction to your Transaction Coordinator through eContracts. The first step to enable this process is to select the Transaction Coordinator(s) in Utilities.

1. **Your transaction coordinator needs to have an eContracts account** in order for them to appear on the list of CTMe Transaction Coordinators.

2. Click on **Utilities** and then under **Personal Settings** click on **Transaction Coordinator Settings**.

3. Click on **Add New Transaction Coordinator**

4. Locate the Transaction Coordinator by First Name or Location.

5. Click on the radio button next to the Transaction Coordinator you wish to add to your settings.

6. Check which settings you would like for this Transaction Coordinator (i.e. Set as your Preferred TC and or Allow TC to receive contract deadline email notifications).
NOTE: You will need to scroll to the very bottom of the list to find these selections.

7. Click **Save Selection**

8. Once you review your selection you will need to click on **Save Settings**

Note: Adding a TC to your preferred TC settings does NOT mean that this TC will have access to any of your transactions. To allow a TC to have access to a transaction, you must select the TC from the Transaction Detail Dashboard.
If you wish to remove a TC you will click on the box next to Remove this TC from list. Then click on **Save Settings**

Adding a Transaction Coordinator to a Specific Transaction

1. From the main menu click on **Client`s Name**

2. Click on the **Property Address** of the transaction you want to send to the transaction coordinator.

3. Now you are in the ***Detailed Transaction***. Click on **Transc. Coordinator** on the right hand **Detailed Dashboard**.

4. From the drop down box, choose which TC you want to handle this transaction.

5. There will be a check box to **"Allow to receive contract deadline email notifications"**.
The option you chose in **Utilities** will automatically display. If you do not want that option for this transaction either check or uncheck the box to reflect your needs for this transaction.

6. Click **Save Settings**

7. The Transaction Coordinator will receive an email notifying him or her of the transaction.

Transaction Coordinator Settings for TC

To view agents that have Assigned you as their preferred Transaction Coordinator go to **Utilities** and click on **Transaction Coordinator**. This will display all agents that have selected you as a Preferred TC.

To view transactions assigned to you by agents:

1. Go to the main page of **Clients with Contracts Displayed by Client Last Name**. The agents/clients that have assigned transactions to you will be displayed in alphabetical order. If you want to display them by address click on **Display By Address**towards the top/left of the screen.

2. Click on the **Agent Name**. Then click on the **Property Address**.

3. You then will see the list of all **CONTRACTS/ DISCLOSURES/ DOCUMENTS** that an agent has created for this ***Detailed Transaction***.

4. Click on **Transc. Coordinator** on the **Detailed Dashboard** to the right.

5. Check which settings you would like for this Transaction:

☑ Allow Agent to View My Custom Deadlines and/or

☑ Allow Agent to Receive my Custom Deadline Email Notifications

6. To add your Custom Deadlines to a transaction click on **Custom Deadlines** on the **Detailed Dashboard** to the right.

7. Then click on **Add My Custom Deadlines** at the top. You can select which Custom Deadlines you want to add individually or check the **Select All**. Then Click on Add Deadlines to Transaction.

NOTE: You will need to do this for each transaction that you receive from an agent.

8. The **eCalendar** will now show the custom deadlines that you have added.

9. The eCalendar can now be displayed by Status. Click the down arrow at the top left of the eCalendar to choose which status you want.

10. Now when you create the **eContact Sheet** it will have your information on it. When the **eContact Sheet** is emailed it will show that it is from you with your logo in the email.