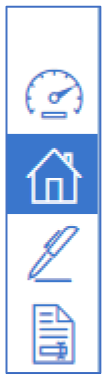
Downloading Transactions from Transaction Desk

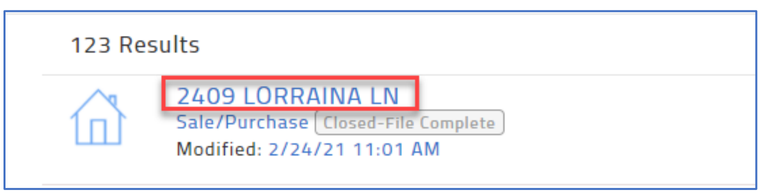
As we prepare to transition the online forms program from Transaction Desk to Docs+, you will want to download any transactions that you need to save and transfer them to another storage location. This will make sure you have access to those transactions when you no longer have access to Transaction Desk.

1. Log into Transaction Desk through RCO3 or the dashboard.

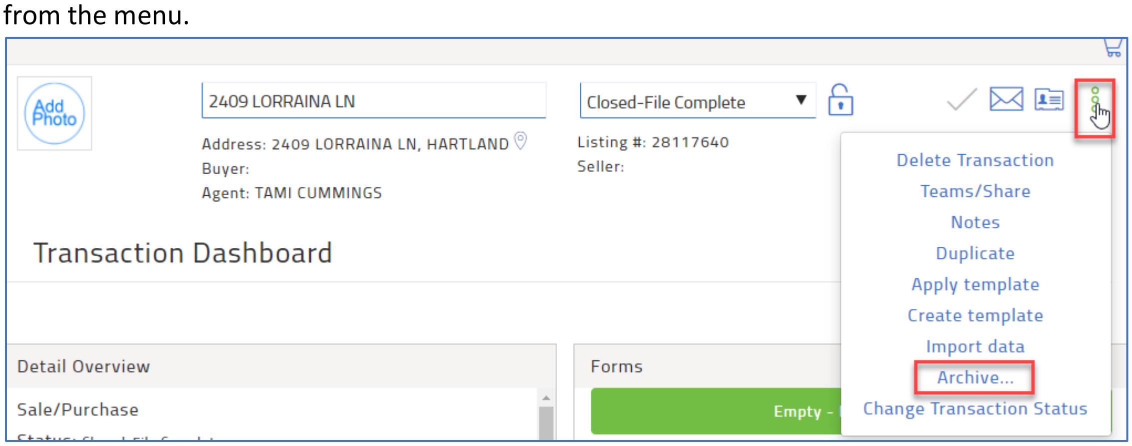
2. Access your transactions by clicking the house icon on the left-side menu on your Transaction Desk homepage.



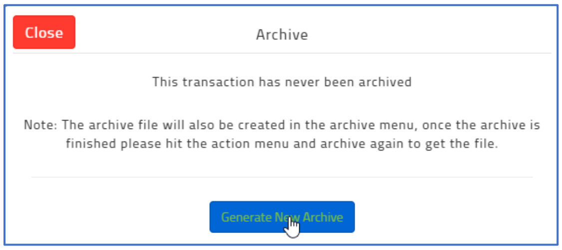
3. Click the name of the desired transaction. This will take you to the dashboard specific to that transaction.



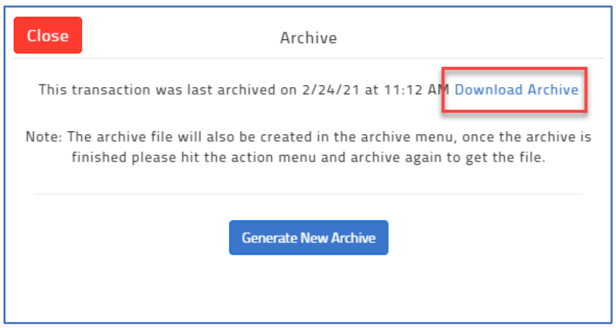
4. On the Transaction Dashboard, click the three-dot menu in the upper right and select Archive from the menu.



5. Click Generate New Archive.

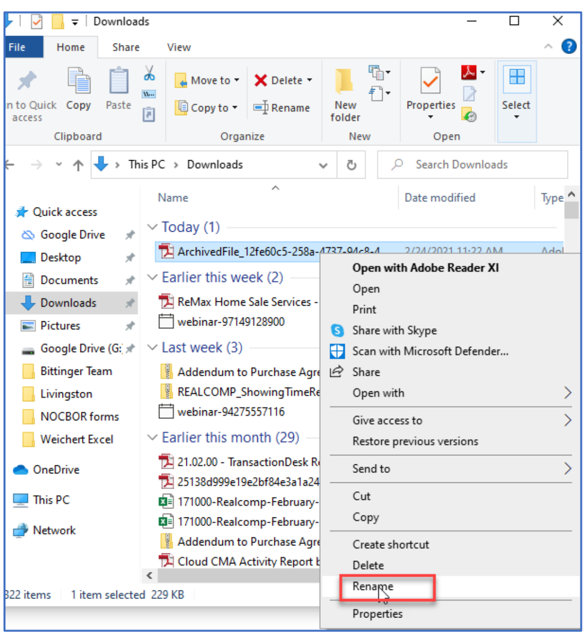


6. When you get the message that the archive has been created, go back to the three-dot menu in the upper right and select Archive again. This time you will have the option to Download Archive.

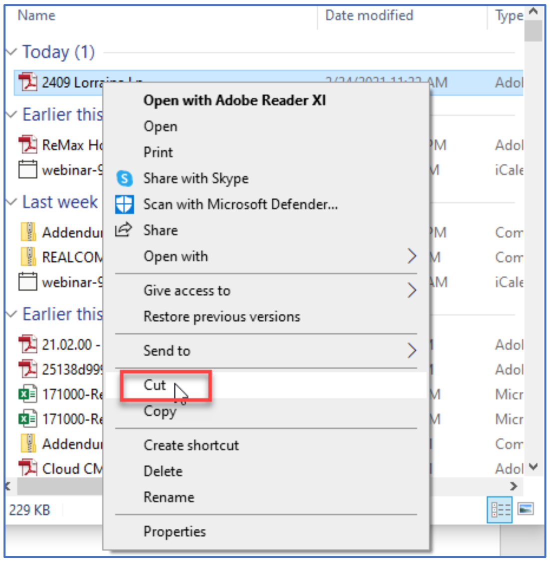


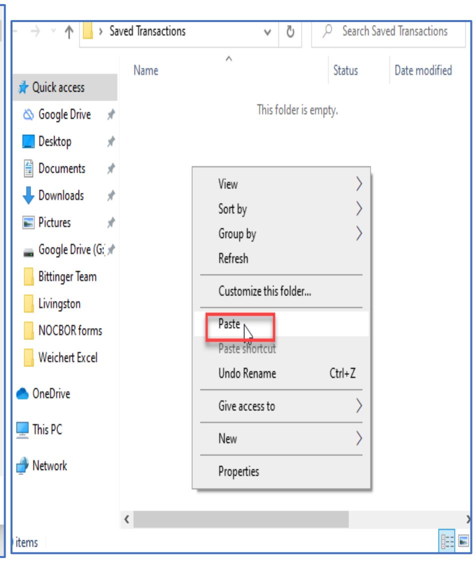
This will put a pdf of the transaction in your downloads folder on your computer.

7. Go to your Downloads folder and right click on the file that starts with “Archived File” and rename it using the address of the property or the customer’s name, whichever will make it easier of you need to access the information again.

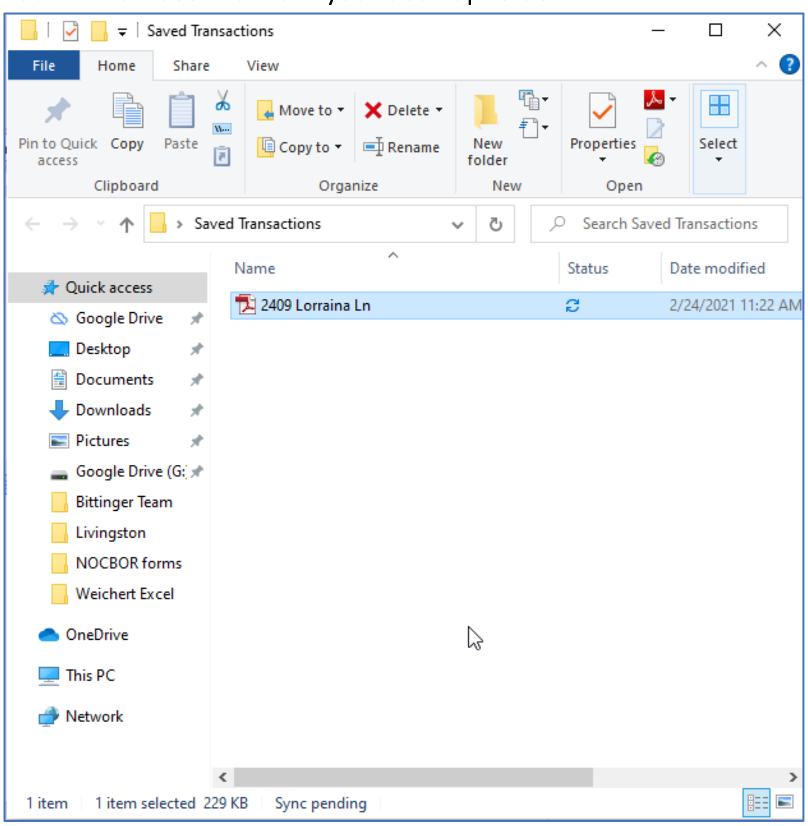


8. Create a folder on your desktop for your saved transactions. You can then drag and drop the downloaded file into the folder or cut it from the Downloads folder and paste it into the new folder on your desktop.





9. You will now see the file in your desktop folder.



10. Repeat steps 2-8 for each transaction you want to save to your computer.
11. Once the files are all downloaded, you may want to move that folder to a CD, thumb-drive or online storage location to move them off of your computer.

If you have additional questions, please contact Realcomp's Customer Care at (866) 553-3430.