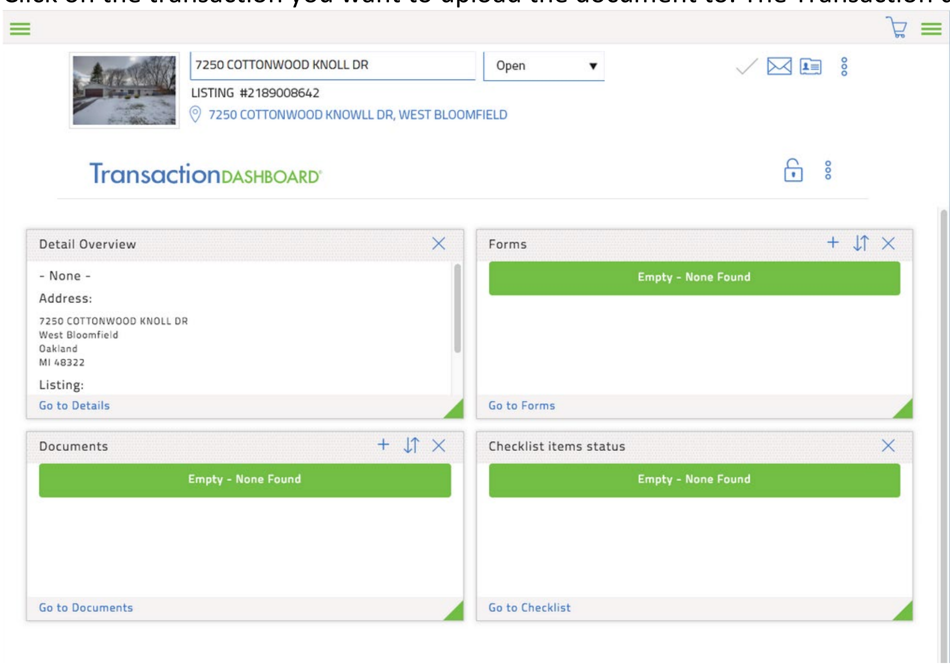
Add a Document to a Transaction

Summary

Describes how to upload a document and attach it directly to a transaction in TransactionDesk.

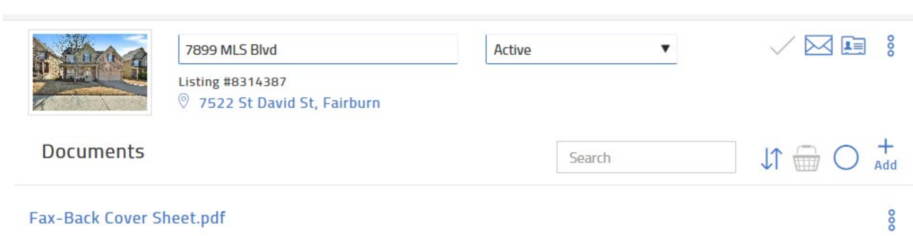
Steps

1. In TransactionDesk, navigate to the list of transactions, either using the Transactions widget, or by clicking the TransactionDesk icon.
2. Click on the transaction you want to upload the document to. The Transaction dashboard appears.

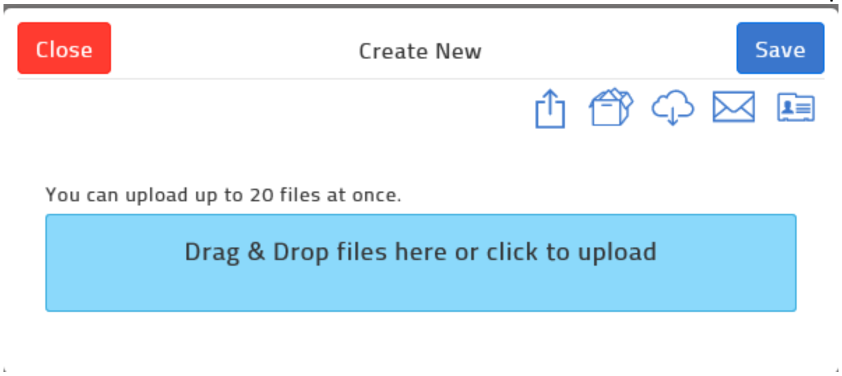


3. Do one of the following:
   - Click the Documents widget to open the list of documents.
   - From the right-hand menu, select **Documents**.

   The list of documents attached to the transaction appears.



4. Click **Add** and select **Add new document**. The Create New document page appears.



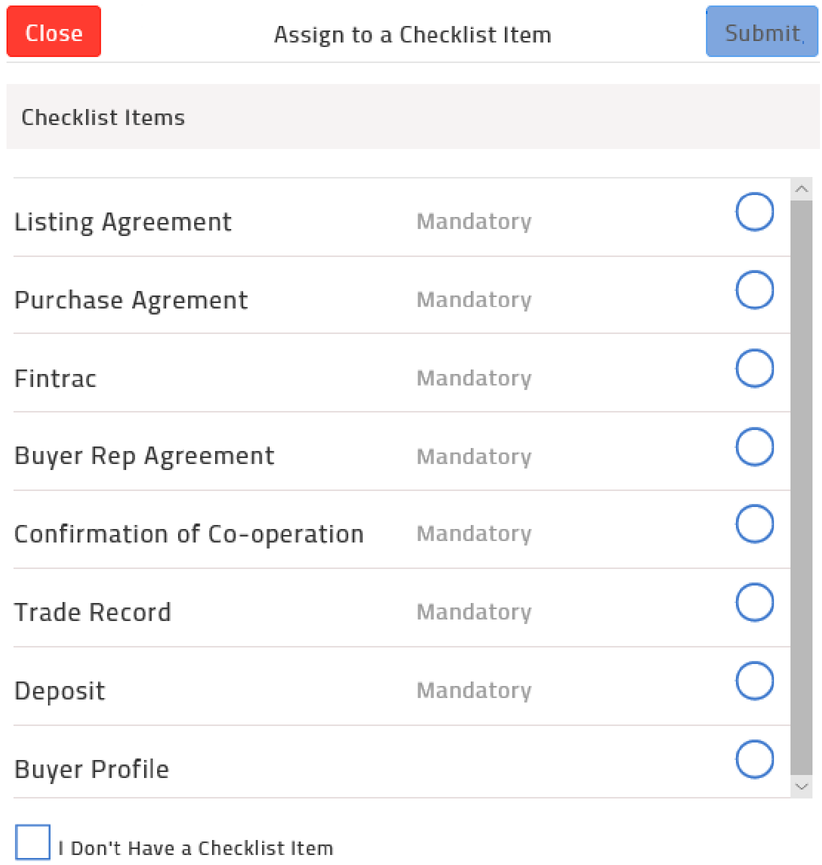
5. Do one or more of the following:

   - To upload a document from your computer, click (selected by default when you first see the page). Then drag and drop files from your computer to the **Drag & Drop files here** area, or click the blue bar to browse for the document(s) you want to upload.
   - To copy documents from your DocBox, click . Navigate to and select the appropriate document, and click **Save**.
   - To import a document from Dropbox, Google Drive, or another third-party document storage system, click . Select the appropriate third-party document storage system, locate the document, and click **Add**.
   - To upload a document from your email account, click . The Email Upload Information page appears. Click **Open in Email Client**. Locate the document, and click **Add**.
   - To download a contact card for the transaction, so that you can email documents directly to the transaction, click . This adds an email contact to your email. In future, you can email documents directly to this contact, and the documents are attached automatically to the transaction.

6. Click **Save**.

7. If you need to send the document for broker review, to the right of the document, click the ring the bell icon (Request Review).

   Note: If your brokerage requires that you attach documents to the correct checklist item, you see the following:



a) Select the appropriate checklist item by clicking the select icon to the right, or check **I Don’t Have a Checklist Item**.

b) Click **Submit**.