

Email a Document From a Transaction

Summary

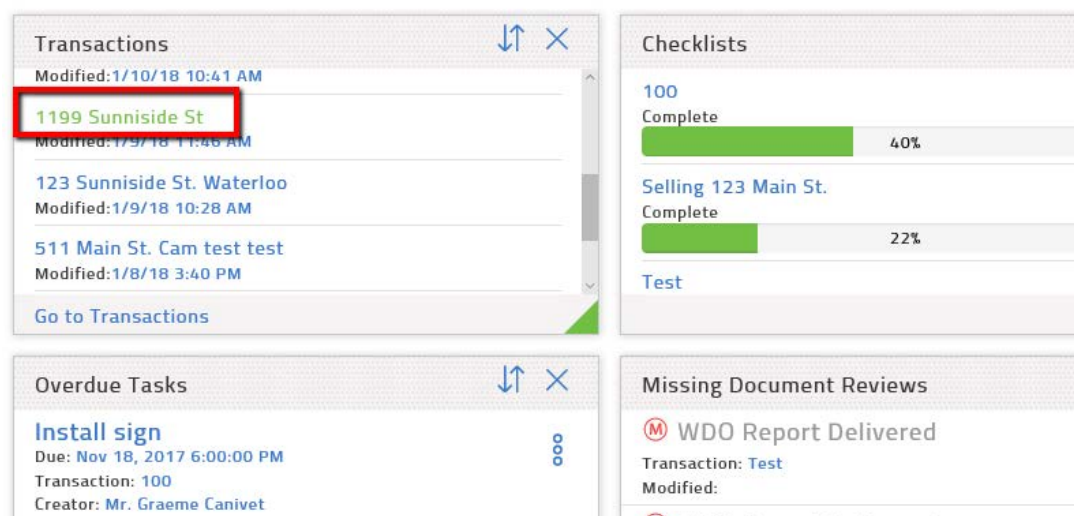
Describes how to send a document or form that is attached to a transaction via email.

Steps


Email a document

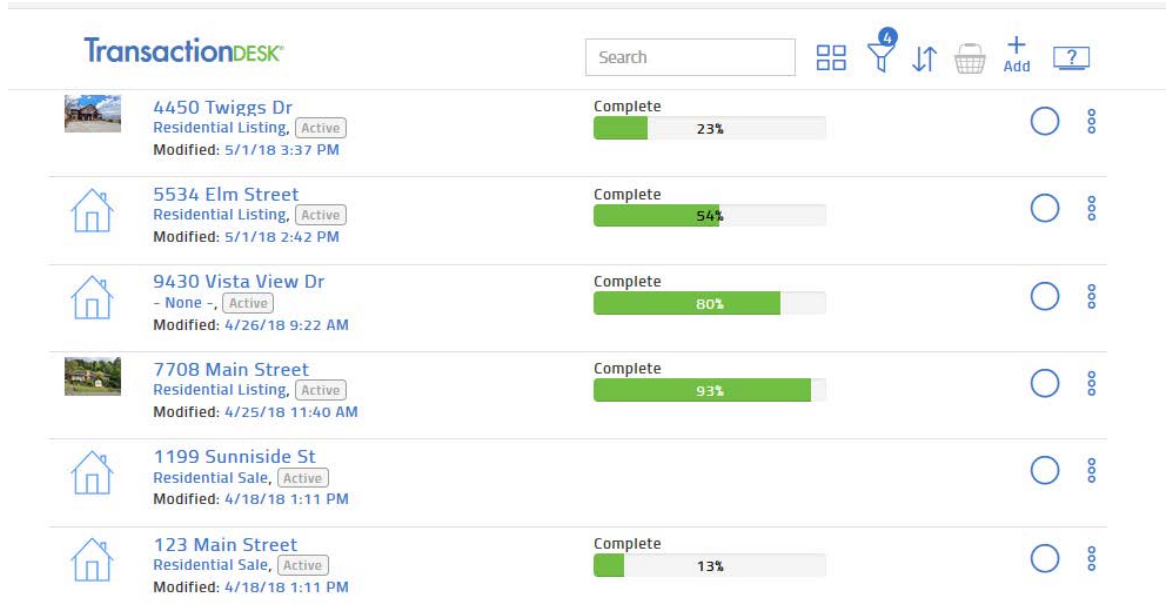
1. Navigate to the transaction in one of the following ways:
 - In the Agent dashboard, with the Transactions widget visible, click on the transaction name to open the transaction.

Agent DASHBOARD



The screenshot displays the Agent Dashboard interface. The 'Transactions' widget is visible, listing several transactions. The transaction '1199 Sunnyside St' is highlighted with a red box. Other transactions listed include '123 Sunnyside St. Waterloo' and '511 Main St. Cam test test'. The 'Checklists' widget shows progress for '100' (40% complete) and 'Selling 123 Main St.' (22% complete). The 'Overdue Tasks' widget shows a task 'Install sign' due on Nov 18, 2017. The 'Missing Document Reviews' widget shows a review for 'WDO Report Delivered'.

- Click the TransactionDesk icon  , locate the transaction in the list, and click on the transaction name to open the transaction.

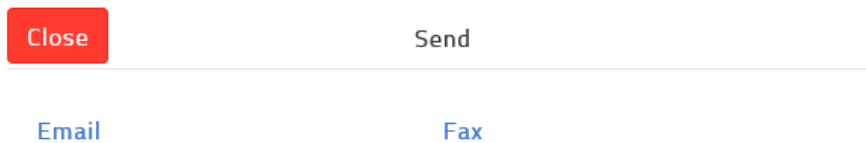


The screenshot shows the TransactionDESK interface. At the top, there is a search bar and several utility icons. Below is a list of transactions, each with a house icon, address, status, and a progress bar. The transactions are:

Address	Status	Progress
4450 Twiggs Dr Residential Listing, Active Modified: 5/1/18 3:37 PM	Complete	23%
5534 Elm Street Residential Listing, Active Modified: 5/1/18 2:42 PM	Complete	54%
9430 Vista View Dr - None -, Active Modified: 4/26/18 9:22 AM	Complete	80%
7708 Main Street Residential Listing, Active Modified: 4/25/18 11:40 AM	Complete	93%
1199 Sunnyside St Residential Sale, Active Modified: 4/18/18 1:11 PM	Complete	100%
123 Main Street Residential Sale, Active Modified: 4/18/18 1:11 PM	Complete	13%

- In the right-hand menu, select **Documents**. The list of documents attached to the transaction appears.

- Click the More Options menu  and select **Send**. The Send page appears.



The screenshot shows the Send page. At the top, there is a red **Close** button and a **Send** button. Below these are two options: **Email** and **Fax**.

4. Click **Email**. The Email page appears.

The screenshot shows a web form titled "Email" with a "Close" button on the left and a "Send" button on the right. The form has three tabs: "Information" (selected), "Items", and "Fax-Back". Under the "Information" tab, there are several fields: "Recipient Name" (empty), "Recipient Email *" (empty with a contact icon), "Add CC" and "Add BCC" (links), "Subject" (containing "TransactionDesk Document Sent from Mr. Graeme Ca"), and "Message" (empty). At the bottom, there are two radio buttons: "Send as a link" (selected) and "Send as attachment".

5. Optional: In the **Recipient Name** field, enter the name of the person you are sending the email to.
6. In the **Recipient Email** field, enter the email address to send the form to. You can type the email, or click the contact icon to see the list of contacts for the transaction, and select the contact from that list.
7. Optional: Add any CC or BCC email addresses required.
8. Optional: In the **Message** field, enter a brief message to the recipient.
9. By default, the email sends a link to the document. If you want to attach the document to the email instead, select **Send as attachment**.
10. To confirm what document is being sent, click the **Items** tab, and review what will be sent.
11. If the document you are sending is to be faxed back to you, click the Fax-Back tab and check Include **Fax-Back Cover Sheet**.
12. Click **Send**.