TransactionDesk

Email a Document From a Transaction

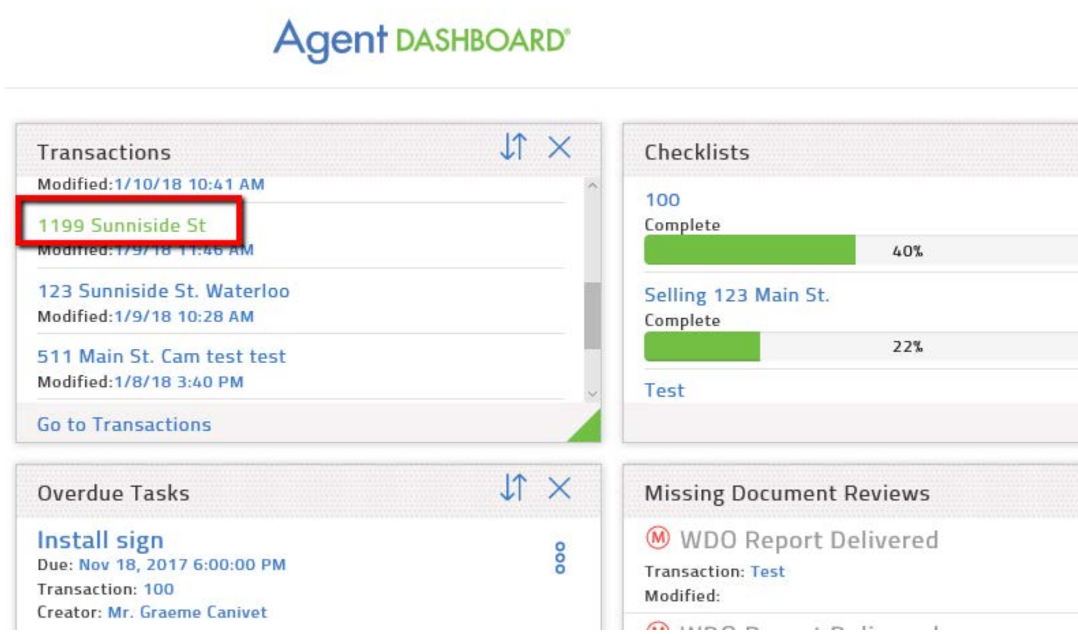
Summary

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

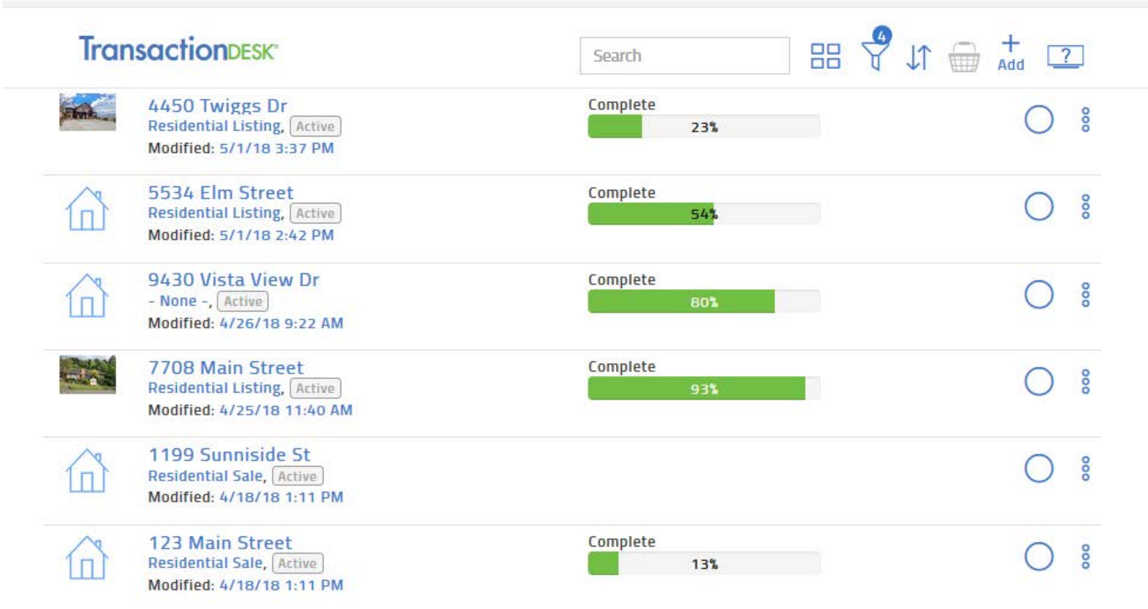
Steps

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.

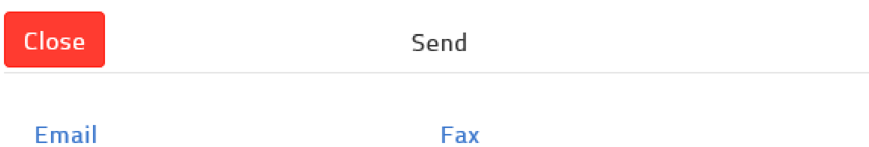


- Click the TransactionDesk icon , locate the transaction in the list, and click on the transaction name to open the transaction.



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

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



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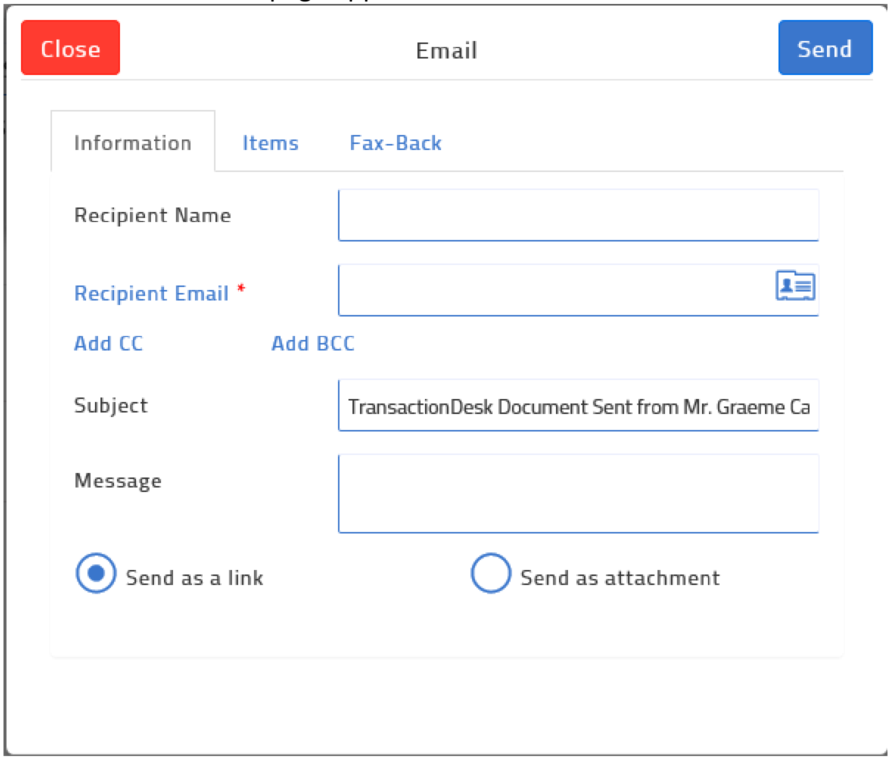
4. Click **Email**. The Email page appears.



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**.